

**A Critical Realist Approach to Evolutionary Path Dependence: The Role of  
Counterurbanite Entrepreneurs in Tourism Regions of Rural Newfoundland**

**by**

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### **Author's Declaration**

I hereby declare that I am the sole author of this thesis. This is a true copy of this thesis, including any required final revisions, as accepted by my examiners.

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## **Abstract**

Path dependence has emerged as an approach to understanding economic decline in peripheral areas, consisting predominantly of space-based economic activities. Evolutionary economic geography is one lens through which transitioning path dependent locales, of industrial homogeneity, can be critically examined (Steen and Karlsen, 2014). This is because of the evolutionary nature of economic and social systems, which constitute the structures and conditions that largely dictate path dependent trajectories (Martin and Sunley, 2006). Some path dependent rural regions have been successful in creating new trajectories through tourism entrepreneurship (Brouder, 2014; Williams, 2013). This research investigates the evolution of one such path in a historically marginalized region of eastern Canada: rural Newfoundland.

The purpose of this study is to determine the role of rural in-migrant entrepreneurs in unlocking two path dependent, peripheral areas, of rural Newfoundland: Brigus and Trinity Bight. More specifically, this study investigates the role that counterurbanites are playing in the development of a rural tourism trajectory, their motivations and residential histories, and, their impacts on local capacity building and job creation. The study is guided by a critical realist paradigm, which allows for an explanatory analysis of event causation, in an open, but stratified, socio-economic system.

Findings are threefold. First, it is determined that the civic sector (i.e. non-profit groups, individual volunteers) plays an important role in initiating tourism path-creation; second, both regions are found to have low numbers of local resident tourism entrepreneurs; and, third, only one of the two regions investigated showed signs of tourism clustering through path-extension and path-renewal. These three events, respectively, are causally linked to: a) anxieties of resettlement, lack of economic alternatives, community cooperation, and a strong sense of community identity; b) lack of entrepreneurial spirit, and new primary sector opportunities; and c) newcomers' outside perspective, desire for belonging, and uninhibited cognitive/political 'lock-in' to the island's socio-economic history. The generative mechanisms responsible for producing these events include: a) Newfoundlanders' unique collective diasporic identity; b) path-reversion; and c) geographic isolation and peripheral barriers.

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2013–2015

*for your testament to your commitment and limits of your heart...*

2015–2018

*for your unwavering support, patience, comfort and encouragement...*

2018–

*for providing me the opportunity to be me, here, and with you...*

*I dedicate this thesis to you*

Phil Bartliff

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## **List of Abbreviations**

ACOA	Atlantic Canada Opportunities Agency
BHCS	Brigus Historical & Conservation Society
BDA	Brigus Development Association
CED	Community Economic Development
CR	Critical Realism
DTTA	Discovery Trail Tourism Association
ERC	Economic Recovery Commission
GNP	Great Northern Peninsula
NAFO	North Atlantic Fisheries Organization
NCARP	Northern Cod Adjustment and Recovery Program
HSANL	Historic Sites Association of Newfoundland and Labrador
REDB	Regional Economic Development Boards
RS	Rural Secretariat
SR	Scientific Realism
SSP	Strategic Social Plan
TAGS	The Atlantic Groundfish Strategy
TCH	Trans-Canada Highway
THS	Trinity Historical Society
UNESCO	United Nations Educational, Scientific and Cultural Organization

# 1 Introduction

## 1.1 Context

Rural areas of the developed world are undergoing significant economic, social and political restructuring (Cloke et al., 2006; Woods, 2011). Transformation of hinterland regions, traditionally dependent upon natural resource extraction (e.g. fishing, agriculture, mining), is a response to events such as depleting stocks, industrialization and, in particular, decreased government support (Ilbery, 1998). Since the 1980s, for example, government policy has shifted from Fordist-Keynesian growth models to neoliberal forms of rule (Young and Matthews, 2007), in an effort to reduce dependence on the welfare state, to encourage self-governance, and to limit industry regulations in favour of expanding the free market (Ilbery, 1998). Consequently, there has been increasing pressure to find alternative livelihoods in unconventional industries, which has been complicated in a climate of uncertainty marked by little government oversight of regulatory systems (e.g. privatization, monopolies) (Wilson, 2017), declining rural services, and massive outmigration (Coates, 1977; Woods, 2011). In Canada, and elsewhere, an extensive history of exogenously-controlled resource extraction has had serious repercussions for long-term economic growth. This has resulted in over-dependence on primary sector activities, and has dampened diversification efforts (Tonts and Plummer, 2012). Problems have been exacerbated in remote and peripheral areas because of limited alternative economic opportunities, isolation, and a lack of innovation (Diochon, 2003; Siemens, 2013).

Evolutionary economic geography provides the lens through which one can understand this situation (Brouder, 2017). In recent years, this dilemma has gained considerable attention, and is well documented in the literature on evolutionary path dependence (e.g. Brekke, 2015; Martin, 2012; Mitchell and O'Neill, 2016b; Steen and Karlsen, 2014; Underthun et al., 2014). As per evolutionary economic geography, path dependence “is often constructed as a form of *place* dependence in which local or regional outcomes are, in one way or another, shaped by past events and outcomes” (Tonts et al., 2014, p. 363, see also Brouder, 2014). This suggests that “history matters” (David, 2007, p. 92), in that previous modes of investment, technology, institutional structures (e.g. political, economic), and social arrangements, serve as self-reinforcing mechanisms that can restrain or enable new forms of regional development (i.e.

‘institutional thickness’) (Amin and Thrift, 2002, p. 303; Plummer and Tonts, 2013). In regions with prolonged periods of industry homogeneity, however, undesirable structural “lock-ins” (e.g. cognitive, political) can result in the “inability to shake free of their history” (Martin and Sunley, 2006, p. 399), making them susceptible to “external shocks” (e.g. market fluctuations, resource shortages) (Schienstock, 2007, p. 93). In this event, alternative development trajectories require “radical innovation” and economic diversification; a challenging feat to achieve in marginalized rural locales (Boschma and Frenken, 2006, p. 286).

In spite of this, rural tourism has proven remarkably successful in some post-industrial regions (Koster and Lemelin, 2009; Prince, 2017; Randelli et al., 2014). In several Canadian locales, such as Lunenburg, Nova Scotia (George et al., 2009), Prince Edward County (Stolarick et al., 2010), and St. Jacob’s (McClinchey and Carmichael, 2010), Ontario, Chemainus (Woods, 2005), and Salt Spring Island (Halpern and Mitchell, 2011), British Columbia, Grand Manan Island, New Brunswick (Mair, 2006), Dawson City, Yukon (Steel and Mitchell, 2017), and Fogo Island, Newfoundland and Labrador (Rockett and Ramsey, 2017), rural tourism has superseded traditional economic activities as the primary form of economic development, and can potentially act as a panacea to vulnerable communities facing resource decline (Baum, 1999; Gartner, 2005). In many ways, rural tourism is associated with traditional industries and local livelihoods, as visitors typically seek both natural (e.g. oceans, landscapes) and cultural (e.g. traditions, historical sites) place-based amenities (Roberts and Hall, 2001). This approach sees endogenous-led place-based development as key to building resilient, self-sufficient communities, while, at the same time, facilitating empowerment, strengthening local capacities, and enabling residents to take control of their own future (Kneafsey et al., 2001; Woods, 2007). Because of this, place-based tourism has become a popular form of economic diversification in path dependent communities, and part of a broader regional development approach to transition production-dominant regions into spaces of multi-functionality (i.e. production and consumption) (Marsden, 2012; Wilson, 2010).

According to Ryser and Halseth (2017), this “new regionalism has become a product of neoliberalism as regions experiment with different institutional structures and relationships in an attempt to compensate for government withdrawal and innovate to establish better local participation, competitive advantage, and economies of scale” (p. 124, see also Smyth et al., 2004). Rural residents, previously engaged in primary sector activities, can capitalize on local

knowledge and place-based assets to create tourism-related businesses (e.g. farmhouse B&B – Nilsson, 2002). The outcome of this place-based tourism approach has led to branching innovating trajectories through entrepreneurship in many disadvantaged rural locales (Brouder and Eriksson, 2013; Dubois et al., 2017; Mitchell and O’Neill, 2016b).

Many studies address the rise of cultural heritage tourism trajectories in rural post-industrial path dependent regions (Carson and Carson, 2014; Steel and Mitchell, 2017; Vuin et al., 2016). This development sees processes such as recombination as “the efficient redefinition of resources and competences (combination with new elements) determining the former development trajectories, which enables purposeful entrepreneurial deviations towards new development paths” (Lengyel and Molnár, 2015, p. 376). Other processes are also used to extend (layering) and renew (conversion) development paths, which increases industry innovation, diversification, and rural resilience (Steen and Karlsen, 2014).

Researchers also focus on the role of amenity-seeking rural in-migrants in these evolving tourism regions (Mitchell and Madden, 2014; Vuin et al., 2016). Amenity seeking rural in-migrants, both returnees and newcomers, are typically drawn to a rural lifestyle and natural and cultural amenities (e.g. oceanfront, historic architecture) (MacMichael et al., 2015; von Reichert et al., 2014). These rural features are commonly recombined with tourism ventures to create new paths of local economic development (e.g. heritage-themed accommodation) (Steel and Mitchell, 2017). Because of this, rural in-migrants may choose to open a rural firm as part of their lifestyle motivation (Vuin et al., 2016), or to afford their rural move (Mitchell and Shannon, 2017). In-migrant entrepreneurs are important sources of externally-accumulated capital (e.g. social, cultural) and extra-local resources (e.g. networks). This is crucial to promote neo-endogenous development goals, which sees exogenous sources (e.g. in-migrants) mobilize endogenous resources, such as local knowledge and cultural heritage assets (Steel and Mitchell, 2017).

## **1.2 Research Approach**

Broadly speaking, this study is concerned with the evolution of rural path dependent regions, and seeks to “understand long-term economic change and why it differs between regions” (Brouder, 2014, p. 2). The theory of path dependence is interdisciplinary and meta-theoretical (Essletzbichler, 2009), meaning it lends itself to a diverse range of topics related to regional economic development, including entrepreneurship (Stam, 2010) and



counterurbanization (Philip and MacLeod, 2018). This also includes research on tourism development (Ioannides et al., 2014), especially since the “evolution of the tourism economy has a special spatial dimension because it emerges and evolves in different regions around the world in quite different ways” (Brouder and Eriksson, 2013, p. 372). With this in mind, a comprehensive investigation of the impacts of counterurbanite entrepreneurs in evolving post-industrial rural tourism communities is necessary, and forms the point of departure for this study.

Entrepreneurship is a fundamental component of the economic evolution of rural landscapes because of its innovative capabilities. In addition, it is “a distinctly spatially uneven process, and thus an important explanation of the uneven economic development of regions and nations” (Stam and Lambooy, 2012, p. 85). Therefore, research on the characteristics and location preferences of the rural entrepreneur is important to enhance our understanding of regional economic development. As many have pointed out, entrepreneurship is essential to breaking the path dependent cycle (e.g. Fredin, 2016; Hedfelt et al., 2015; Hefferman, 2003), sometimes resulting in the creation of tourism trajectories (e.g. Viken and Granås, 2016).

Counterurbanization is also evolutionary and uniquely spatial. It is increasingly popular to migrate to post-industrial communities because of their authentic appeal, rural attributes (Chi and Marcouiller, 2013; Hines, 2010a; Hines, 2010b), and growing small-scale rural tourism charm (Bianchi, 2000; Thulemark et al., 2014). Moreover, counterurbanites hold different motivations for relocating that impact their rural destination choice (Mitchell and Madden, 2014), some of which include quality of life (Jones et al., 1986), “a feeling of belonging or being part of a community” (MacMichael et al., 2015, p. 37), and/or the attractiveness of tourism entrepreneurship in rural areas (Carlsen et al., 2008; Lardiés, 1999). Motivations also vary depending on the type of counterurbanite (e.g. returnee, newcomer) (Stockdale, 2006, 2014). Thus, it is important to research counterurbanite characteristics and motivations to further our understanding of the evolution of path dependent areas, especially in light of the “recognition that places and processes of place-making represent important components of mobilities” (Milbourne and Kitchen, 2014, p. 326). As such, a better understanding of counterurbanization in path dependent locales is crucial, as “places are economically, politically and culturally produced through the multiple mobilities of people, but also of capital...and information” (Urry, 2007, p. 269). Given this, rural Newfoundland is a highly attractive geographic area to conduct such an investigation. Reasons for this are provided below.

### 1.3 Study Location Rationale

This study takes a novel approach to understanding the evolution of an economy in a peripheral region of Canada. Newfoundland has experienced economic instability, and high rates of rural out-migration, throughout its history (Overton, 2007). During the 1980s and early 1990s, many fishery dependent communities were faced with unprecedented unemployment rates as government restrictions, and eventually closures, of off-shore fisheries and related industries, occurred in response to over-exploitation of cod resources (i.e. external shock) (Baum, 1999; Overton, 2007; Schrank and Roy, 2013). The 1992 cod moratorium left the majority of outport communities vulnerable (i.e. locked-in), since “fishing is closely bound up with the history and culture” and few “other forms of employment or livelihood existed or had been considered for generations” (Baum, 1999, p. 51). In fact, some avow it is “difficult to over-emphasize the importance of the fishery to the people of Newfoundland”, and that since “confederation with Canada, the cod fishery remains the single most powerful source of collective identity for the people born and raised” in Newfoundland (Rose, 2008, p. 5).

In recent decades, parts of Newfoundland, like many other rural peripheral regions, have capitalized on their unique cultural heritage assets to diversify and achieve endogenous development goals (Fife, 2004a; Sullivan and Mitchell, 2012). Path-creation through place-based tourism is an appropriate strategy, since Newfoundland has “become regarded as unique and unspoiled—a bastion of folksy humanity on the edge of the technocratic, metropolitan world”, and a destination for those who wish “to “tune out” the modern world of money and industrialization and “turn on” to the Newfoundland world of rural simplicity” (Chafe, 2003, p. 72). Further, studies show that this new path trajectory (i.e. cultural heritage tourism) has generated new socio-economic opportunities for once fishing-dependent regions (e.g. Everett, 2009; Overton, 2007; Rockett and Ramsey, 2017; Stoddart and Soderro, 2015). The adoption of cultural heritage tourism, however, poses questions as to who are the different stakeholders involved, what role the public, civic, and private sectors play in the transformation of these now multi-functional rural spaces, and how it has evolved over the past few decades years. Moreover, given the allure of rural Newfoundland to the post-modern tourist (Fife, 2004a), the island has significant potential to attract external sources of investment from counterurbanite entrepreneurs; specifically, those seeking natural, cultural, and lifestyle-related amenities. Evidence of this is

provided in Chapter 3. As such, this study seeks to investigate the role of counterurbanite entrepreneurs in rural Newfoundland's path dependent communities.

#### **1.4 Method of Inquiry**

Development trajectories of path dependent regions involve the co-evolution of different elements within that region; namely technologies, industries, institutions (e.g. economic, political), and socio-cultural factors (Martin and Sunley, 2006). It would, therefore, be illogical to assume that all regions become locked-in for the same reasons, or that they generate new paths under the same circumstances. Within a region, too, there may be similar and different sources of lock-in that co-exist and interact within the economy *and* within individual institutions, industries, and social arrangements (Isser, 2015; Klitkou et al., 2015). As such, an evolutionary perspective, Vergne and Durand (2011) contend, “requires a multilevel view, for it is pointless to examine a given path over time without considering the environmental-level selection pressures to which it is subject” (p. 8).

Indeed, social and economic influences (e.g. rural in-migrants, financial capital), in post-industrial path dependent locales, requires investigation at varying depths of thinking (Danermark et al., 2002), which, in turn, cannot result in constant conjunctions (i.e. cause and effect) because they are part of an open social system (Mingers, 2006). Path dependence occurs in the social world (e.g. population, culture, economy); thus it is differentiated and hierarchical (e.g. local, regional, national government), and, highly complex, in that economic and social systems are open, nonlinear, dynamic, and evolving (Martin and Sunley, 2006). Unlike natural laws, in complex social and economic systems, rules of society and culture are not universal, but are time-space dependent. Structures within society (e.g. organizing committee, economic and social class) cannot be artificially closed such as those that occur in a simulated setting (e.g. laboratory) (Judd, 2005). The problem with researching evolving systems is that there is always ontological continuity. As such, social and economic change cannot be captured in evolution (Klaes, 2004; Vromen, 2010) without assuming “that all the exogenous valuables (including political and social variables) can be considered ‘given’ and stable<sup>1</sup>” (Ioannides and Nielsen, 2007, p. 10).

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<sup>1</sup> According to Ioannides and Nielsen (2007), mainstream economics depicts technology, resources, and institutions as being exogenous variables.

With this in mind, how do we study and theorize the evolution of path dependence? This is a challenge given that it is in a constant state of flux, occurring differently between regions, within regional economic and social systems, and at different time-space scales with unique elements, structures, and conditions (e.g. institutions, industries, social organizations). Furthermore, it is complex, differentiated, and has varying degrees (Martin and Sunley, 2006), making universal, or strong relational (i.e. causal law or relationship) epistemological assumptions, incompatible with the ontological nature of evolution. The answer to this is found in the philosophy of critical realism.

This study employs ontological stratification—within the philosophy of critical realism (CR). A stratified approach to ontology is necessary to conceptualize and compartmentalize the nature of reality, which, to the critical realist, consists of three domains: the empirical, the actual, and the real (MacKinnon et al., 2009). As such, when investigating the *reality* (empirical) of causal processes of path dependence in a select region, the researcher must take into consideration the underlying *reality* (actual) of the social and economic structures (and their individual agents) that vary considerably in each locale, *and*, the *reality* of the (real) world that exists independent of the mind, which consists of causal powers and mechanisms that produce the real events (or non-events) of which only some are empirically observed (or unobserved) (Archer et al., 2016).

To understand this, critical realists suggest case research because of its contextual richness that enables multi-layered understanding of causal powers and mechanisms (Mingers et al., 2013). Yet, if case studies can offer a breadth and depth of data to describe a phenomenon, Easton (2010) considers “how do we know that what is written as a case analysis represents the “truth”? How can we justly claim that we know, in some fundamental sense, what it is that we have researched?” (p. 118). Danermark et al (2002) argue that in critical realist research, the investigator may use multiple case studies, which manifest similar structures and conditions, but have unique and unknown social and economic structural differences within. Bergene (2007) concurs, adding that comparative analysis “allows for an examination of patterns of similarities and differences across a moderate number of cases, thus combining depth with a more extensive approach” (p. 7).

On account of these claims, this research comparatively investigates two rural areas (i.e. Brigus and Trinity Bight) to detect similarities and differences of path dependence evolution

within the same geographic space (i.e. Newfoundland). This ensures that observed structures and conditions of a geographic space are relatively consistent across that space (e.g. provincial and federal governments), which enables the researcher to determine different social and economic structures within that space (i.e. two study sites). To understand how trajectories are created and evolve, then, it is necessary to examine the individual realities of multiple trajectories and their structural influences. This makes CR an ideal paradigm because of its ontological stratification of reality. The following section underscores what it is that this study seeks to accomplish.

### **1.5 Research Intent, Objectives and Questions**

The goal of this study is to examine the process of counterurbanization-led neo-endogenous development in relation to cultural heritage tourism in two regions of rural Newfoundland. The central question this research explores is: Are amenity-seeking counterurbanites contributing to the creation of a cultural heritage tourism trajectory in rural Newfoundland and, in doing so, promoting neo-endogenous development? The study is guided by several objectives.

1. To understand the role that counterurbanites are playing in the development of a rural tourism trajectory. Specifically, to determine:
  - i) The types of involvement (i.e. civic, public, private)
  - ii) The timing of, and processes involved with, this development
2. To understand the types, and motivations of rural in-migrant tourism operators who chose to operate a business in rural Newfoundland. Specifically, to determine:
  - i) If lifestyle oriented counterurbanites (newcomers or returnees; seasonal or year-round) are the dominant cohort.
3. To assess the impacts of counterurbanites (newcomers, returnees, seasonal and year-round) on local residents. Specifically, to determine if they are,
  - i) Mobilizing local labour
  - ii) Building local capacity

### **1.6 Pluralistic Meta-Theoretical Framework**

*Epistemologically*, this thesis draws upon three streams of literature to formulate a meta-theoretical context that navigates the research investigation. This is because path dependence is evolving; this necessitates inclusive theoretical perspectives from a broad range of disciplines to

ensure a comprehensive understanding of human knowledge (MacKinnon et al., 2009). This meta-theoretical context combines, not exclusively, research on rural change, counterurbanization, and cultural heritage tourism. Together, these concepts and theories guide the research objectives and questions.

*Ontologically*, CR is meta-theoretical, in that it holds certain assumptions about the complexity of the natural and social worlds, while, at the same time, facilitates acumen through the use of differing paradigms to meet its methodological and research methods needs (Mingers, 2006). Accordingly, this investigation employs a mixed-method, multi-source and multi-stage approach. By virtue of ontological stratification, analysis avoids simplistic reductionism of complex path dependence phenomena in favour of a critical realist explanatory research model as methodological guidelines, to investigate causality at varying levels in open systems (empirical, actual, and real). A causal language is then used to critically explain and interpret the relationship between each level of reality, or, the manifest phenomena and the causal powers that generate the mechanisms that produce them (Bhaskar and Danermark, 2006).

## **1.7 Thesis Outline**

This thesis is divided into nine chapters. Chapter 2 presents a literature review of three overarching themes: rural change, counterurbanization, and cultural heritage tourism. The third chapter provides a detailed history of Newfoundland. Chapter 4 discusses the research methodology (critical realism), methods and tools used to conduct the fieldwork, the approach to data analysis, and provides an overview of the two rural regions under investigation: Brigus and Trinity (Bight). The fifth and sixth chapters present the research findings. Chapter 7 and Chapter 8 apply abductive and retroductive inference, respectively, through an explanatory research model, to determine the event demi-regularities, causal powers, and generative mechanisms responsible for the research findings. Finally, Chapter 9 provides the theoretical and methodological contributions, academic implications, and challenges and limitations of this research, and recommendations for future inquiry.

## **2 Literature**

### **2.1 Introduction**

The purpose of this chapter is to present the literature pertaining to this research. As discussed in Chapter 1, this review is not exhaustive, rather designed to provide an epistemological meta-theoretical framework to guide the research and process. Therefore, this review covers topics related, but not exclusive, to literature from three major areas of interest: rural change, counterurbanization, and cultural heritage tourism. These bodies of literature are discussed in succession hereafter.

### **2.2 Rural Change**

#### **2.2.1 Drivers of Change**

Rural areas have received increasing attention over the past few decades (Cloke et al., 2006). Rural economies of the developed world are undergoing rapid transformation and socio-political restructuring (Ilbery, 1998; Marsden, 1998; Walford et al., 1999; Woods, 2011). The notion of rural restructuring can be described as “shifts from Fordism to post-Fordism<sup>2</sup>, from modernism to postmodernism<sup>3</sup>, and from Keynesian to a neo-liberal state<sup>4</sup>” (Hoggart and Paniagua, 2001b, p. 42). In other words, rural restructuring in developed economies can be understood as the socio-economic and political transformation of the countryside, from modes of production (primary sector), to modes of consumption (service sector) (Ilbery, 1998; Walford et al., 1999; Woods, 2011). However, some argue that rural restructuring “involves fundamental readjustments in a variety of spheres of life, where processes of change are causally linked”, and cannot be explained as a “complete transition from one of these isms to its associated post-ism” (Hoggart and Paniagua, 2001b, p. 42). Rather, rural landscapes have been “altered by a complex

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<sup>2</sup>Fordism to post-Fordism is described as a shift from a post-war model of capitalist accumulation and mass production and consumption, to a model of flexible accumulation, international trade increased mobility of capital, and transnational production and labour (Tauss, 2012).

<sup>3</sup> Post-modernism is described as a break from the era of modernism and is concerned with new social, economic and political order. Post-modernism is concerned with theory for building knowledge and explaining complexities in the world. Post-modernism argues that there are no universal truths (Pitzl, 2004).

<sup>4</sup> The shift from Keynesian to a neo-liberal state refers to decreased government involvement in economic activity. It is believed that less state intervention promotes a free and fair market and lessens dependence on state welfare systems (Hoggart and Paniagua, 2001b).

of transformative forces” that differentiates in terms of scale and degree from one place to the next (Commins, 1990, p. 45).

Regardless of spatial differentiation, rural restructuring is comprised of common characteristics (Commins, 1990), and involves a number of key processes and responses (Woods, 2004). For example, Woods (2005) identifies globalization, and changes to rural economies, social norms and demographics, and agricultural practices, as key processes of rural restructuring. Responses to these processes, Woods (2005) asserts, manifest in changing rural policy, such as neoliberalism, rural development, and rural governance.

Globalization has led to the diversification of rural locales, towards generating alternative forms of income aside from agricultural production and other primary sector activities (Hoggart, et al., 1995; Ilbery, 1998; Mair, 2006; Woods, 2007). Rural landscapes have traditionally served as resource banks for urban locales (Woods, 2011). Explained further, Woods (2011) suggests that “the countryside has been associated with the exploitation of its natural resources through farming, forestry, mining, quarrying, fishing, hunting and energy production” (p. 50). This is because,

...the development of towns and cities created a demand for food and other resources that initiated trade and surplus agriculture produce, as well as the opening of quarries and mines to obtain mineral resources. Over time, commercial farming, forestry, mining and quarrying were developed expressly to service market demands, and collectively came to form the mainstay of the rural economy (Woods, 2011, p. 50).

Post-World War Two, spatial and temporal changes to agricultural production began to take place (Parson, 1999). This involved increasing demands for higher outputs, caused by food shortages and the need to expand and protect rural livelihoods from the threat of globalizing food systems (Marsden, 1998). Improving technology and increasing demands for food, led to intensification, specialization and spatially concentrated agricultural activity. As a result, smaller farms struggled to compete with “the increased use of off-farm inputs including machinery, chemicals, hybrids and technology” (Parson, 1999, p. 344). As part of what is referred to as “agricultural industrialisation” (Parson, 1999, p. 343), farmers turned to mechanized inputs, which reduced physical labour requirements, and ultimately replaced traditional farming practices (Robinson, 1990). The process of agricultural modernization and industrialization led to rising unemployment and the need to diversify rural economies (Marsden, 1998).



Thus, states ideologies, too, play an important role in rural restructuring. Markey et al (2008) suggest that “political restructuring has thus maintained an economic position of resource dependence, while fundamentally altering and lessening government and industry commitments to hinterland communities” (p. 409). Reduced government support and investment further exacerbated the negative impacts of industrialization, such as unemployment, failing infrastructure, and weakening support for public institutions (Markey et al., 2008). A response to the problems associated with the post-Fordism and post-productivism era, was a shift in rural governance towards neoliberal strategies for economic development (Markey et al., 2008).

A neoliberal approach emerged around the 1980s (Mair, 2006). This approach aimed to reduce over-dependence on state welfare systems by limiting market regulations and promoting freedom of exchange (Fletes-Ocón and Bonanno, 2013). For example, the devolution of government investment in Australia, around the late 1980s, was a strategy to encourage agriculturalists and land owners to self-govern, and to lessen their economic dependence on the state (Walford et al., 1999). Higgins and Lockie (2002) argue that neoliberalism “forms of rule are aimed towards shaping the environment within which land managers make their decisions, as well as the types of capacities seen as necessary to act effectively in that environment” (p. 420). Rose (1999) concurs suggesting that “to govern better, the state must govern less; to optimise the economy, one must govern through the entrepreneurship of autonomous actors” (p. 139).

Neoliberalism thinking promotes “market individualism” as a solution to enhancing socio-economic conditions (Cheshire and Lawrence, 2005, p. 436). Furthermore, it is believed that less government intervention will “remove constraints from business activity and retreat from involvement in social and other programs that are viewed as both ‘distorting’ market signals and breeding dependency through welfare-style payments” (Cheshire and Lawrence, 2005, p. 436). Neoliberalism policies, however, are heavily criticized for their lack of government oversight and inadvertent abandonment of rural and small town services. For example, in pre-neoliberal rural Saskatchewan, farmers enjoyed the security of cooperative partnerships, such as the Saskatchewan Wheat Pool that was “created to provide farmers with bargaining strength against, and competition for, agribusiness corporations” (Jaffe and Quark, 2006, p. 211). As global competition decreased leverage for Canadian agricultural exports, federal government intervened to subsidize failing family farms from the free market. However, state support has been “substantially undermined as the Canadian government adopted neoliberal

principals”, based on deregulation and ridding responsibility for rural areas (Jaffe and Quark, 2006, p. 211). This transition mobilized increased private investment, resulting in a monopoly of larger firms and further rural outmigration. To this end, a reduced tax base is coupled with disappearing rural services such as healthcare and educational institutions (Jaffe and Quark, 2006). What is more, rural depopulation drained regions of intellectual capital, and “led to a loss of quality-of-life amenities and imposed burdens on those least able to afford the additional costs of travelling to access regional supports” (Ryser and Halseth, 2014, p. 42).

In response to this, rural development policy has shifted from a space-based to place-based approach (Markey et al., 2015). Examining rural spaces has traditionally been used to guide policies on issues such as infrastructure, political boundaries and social services (Halseth et al., 2010). However, a space-based approach fails to identify unique characteristics of rural communities that may be used as a competitive advantage over other spaces. As the world becomes more globalized (e.g. increased mobility: migration of people, sources of capital, knowledge and information), space becomes less significant. Therefore, place-based approaches are encouraged as they “emphasize the uniqueness of individuals, locations, or regions as a way to discern possibilities and options otherwise discounted or invisible to space-based analysis” (Halseth et al., 2010, p. 3). Therefore, rather than adopting “the neoliberal perspective that sees human beings as relatively autonomous units” (Halseth et al., 2010, p. 4) as proposed by Rose (1999), policymakers should “view human beings as centres of action, well integrated into a network of ties and guided by norms of constraints that significantly guide the options and opportunities of each person” (Halseth et al., 2010, p. 4).

In light of Halseth et al.’s (2010) observation, it is easy to understand how Jaffe and Quark (2006) view neoliberalism as not a complete failure, since it encourages “individualism” by shifting the focus of rural development policy to entrepreneurship and supporting “social cohesion” at the community level (p. 209). To replace state support, governments have realigned their responsibilities as protectors from capitalist market disadvantages, to facilitators of growth through entrepreneurial diversification (Mair, 2006). To Harvey (1989), this transition is best known as a shift from ‘managerialism to entrepreneurialism’, that sees the only logical solution to the wrath of multinational competition, and the demise of natural resource production, is to encourage “flexible accumulation” in vulnerable regions (p. 5). Flexible accumulation is consistent with post-modernism thinking in that it calls for the informalization of specialized

labour to create new avenues for generating capital and diversifying markets (Harvey, 1989). Likewise, “flexible specialization”, according to Piore and Sabel (1984), is:

...a strategy of permanent innovation: accommodation to ceaseless change, rather than an effort to control it. This strategy is based on flexible -- multi-use -- equipment; skilled workers; and the creation, through politics, of an industrial community that restricts the forms of competition to those favouring innovation (p. 17).

Rural restructuring is met with both positive and negative response. Benefits of restructuring are illustrated through the revitalization of rural regions, such as increased rural independence, networking, and competition in the global economy (e.g. adoption of a place-based approach). Shortcomings, however, include dissolution of family farms and traditional ways of life (Cheshire and Lawrence, 2005), and weak government oversight of market regulation, or support strategies for rural regeneration (Galdeano-Gómez et al., 2010). Nonetheless, “as local economies face increasing responsibilities to provide for their own well-being and development, ‘entrepreneurial social infrastructure’ is becoming a necessary ingredient for successfully creating local business communities” (Huggins and Thompson, 2012, p. 1). Entrepreneurship in sectors outside of traditional resources contributes to the “new political social economy of rural space” of emerging “multi-functionality” (Marsden, 1999, p. 503), with culture as a focal point of regional development and the construction of territorial identity (Janković, 2012).

Multi-functionality, according to McCarthy (2005), is “the idea that rural landscapes typically produce a range of commodity and noncommodity use values simultaneously and that policy ought to recognize and protect that entire range of values” (p. 773-74). Mitchell (2013) describes this as a transition from production-led rural landscapes to multi-functional states. This involves:

...the addition of an innovative function (and, by default, user and representation) to a space that does not cause displacement of the existing function (and use and representation). Rather, these innovations co-exist with those that emerged during earlier rounds of accumulation (Mitchell, 2013, p. 376).

Others suggest that “multifunctional rural transition” is described as “a radical reordering of rural space through a shift from production-oriented activities towards more complex and contested blends of production, consumption, and protection” (Tonts et al., 2012a, p. 292). This complex

and contested nature of transitioning rural regions is often referred to in path dependence literature.

Path dependence theory can be used to examine transformations occurring in declining post-productivist regions (Boschma and Frenken 2006; Martin and Sunley, 2006; Mitchell and O'Neill, 2016b; Tonts et al., 2014; Wilson, 2010). For example, Wilson (2008) describes the notion of multifunctional path dependence in terms of industries that transition along a productivist and non-productivist spectrum. This concept implies that declining regions that diversify inherently gravitate to paths of development that resemble their historic past (Steen and Karlsen, 2014). As this theory relates to economic alternatives to rural decline, a summary is warranted and provided below.

### **2.2.2 The Paths of Change**

Rural change evolves along several paths and can be conceptualized using path dependence theory. Path dependence is rooted in economics (e.g. organizational economics) (Rowlinson and Proctor, 1997); specifically, evolutionary economics (Boschma and Lambooy, 1999). Early work by David (1985) challenged economists' views that the past is irrelevant and that a previous function of a property is discarded in a process of natural selection. David (1985) claimed that "it is sometimes not possible to uncover the logic (or illogic) of the world around us except by understanding how it got that way" (p. 332). Path dependence is thus an important tool for those who seek understanding of evolutionary rural change, as "history matters"; previous events are likely to influence the future (David, 2007, p. 92).

More recently, path dependence theory has caught the attention of social scientists, some of whose interests are found in the dynamic processes of declining, and subsequent reinvention of, single-staple industrial regions (e.g. Carson and Carson, 2014; Martin and Sunley, 2006; Mitchell and O'Neill, 2016b; Steen and Karlsen, 2014; Tonts et al., 2014; Underthun et al., 2014). This theory may be used to explore societal behaviours, norms, and routines that can transpire from rural decline and ultimately shape a newfound community (e.g. institutions, social networks, firms) (Tonts et al., 2014). Also, Tonts et al (2014) allude that communities are typically path dependent on technology that mirrors historic modes of production. As a result, the evolution of a resource-rich *place* inherently shadows a 'path' branching analogously to the earliest function of that *space* (Tonts et al., 2014; Neffke et al., 2011). Wilson (2014, cf.

Rotmans et al., 2002) argues that “pathways are directional and bounded by a ‘corridor of the possible’ (path dependency) beyond which certain human decision-making actions become ‘unthinkable’” (p. 8). More specifically, “a path-dependence process or system is one whose outcome evolves as a consequence of the process’s or system’s own history” (Martin and Sunley, 2006, p. 399).

Contributions from Arthur (1988, 1989) examine the notion of “self-reinforcing” processes, which explains how regions become “locked-in” to certain development trajectories. According to Vergne and Durand (2010), exogenous self-reinforcing mechanisms stem from “positive network externalities or increasing returns (e.g. to scale, to scope, to learning)”, and are “very common in organizational life” (p. 743). Garud et al (2010) concur, however, arguing that self-reinforcing mechanisms may also be endogenous such as “alliances with complementors and even rivals” (p. 765). Others suggest exogenous self-reinforcing mechanisms might include “resources dependencies, political struggles, [and] social movements”, whereas endogenous self-reinforcing mechanisms may “account for continuous increases in the understanding of given practices and explain how these continue to structure behaviour and cognition” (Berthod and Sydow, 2013, p. 223). Martin and Sunley (2006) add that a “defining characteristic of path-dependence processes and systems is that of ‘non-ergodicity’, which is the inability to shake free of their history” (p. 399). This is often at the detriment of industrial regions experiencing ‘negative lock-ins’, indicative of negative self-reinforcing mechanisms, making them vulnerable to “external shock” (Oak, 2014, p. 118).

Negative lock-in is a cornerstone of path dependence theory, as post-industrial regions struggle to adapt in the face of economic and technological stagnation (Coenen et al., 2015). A negative lock-in is typical of a single-staple resource town that lacks economic diversification and commercial innovation (Halseth et al., 2016). Wilson (2014) points out four types of path dependent lock-ins: structural, political, economic, and socio-psychological<sup>5</sup>. Structural lock-in is largely uncontrollable, for example, physical structures, such as geography that limits transportation or food networks in peripheral regions (Siemens, 2010), or societal moral codes, such as rural communities that are “often characterized by an inherent conservatism that may stifle innovation” (Wilson, 2014, p. 11). Political lock-ins are linked to instances like imbalances

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<sup>5</sup> Others deviate from these three lock-ins, suggesting political, cognitive and functional lock-ins define post-industrial regions (Underthun et al., 2014).

of power between elite and/or government and community groups that minimize local voices or decision-making, or value systems that marginalize particular groups (e.g. gender-relations). Economic lock-ins are associated with rural exclusion and resistance to globalization and capitalism. Economic lock-in is also resultant of limited external capital (e.g. social, human, and/or financial). Neoliberalism reduces government involvement, which ultimately diminishes the role of exogenous stakeholders. Left to their own device, regions often struggle to detach from their current economic lock-in without external stimuli (Wilson, 2014). Lock-ins may also be related to socio-psychological conditions. This manifests in communities that are unwilling, or unable, to accept and adapt to change. A community, at large, can experience difficulties breaking free from social and psychological ties to place and space. This is closely related to cognitive lock-ins, which refers to “how world views and strategies tend to be homogenous in the sense that hinders innovative imagination” (Underthun et al., 2014, p. 122).

Resilience, borrowed from ecology, is described as the adaptive capacity of a community to bounce back after a ‘shock’ or ‘rupture’ to the system (Wilson, 2014). All regions are vulnerable to external shocks, such as “financial crisis, global recession, and environmental disaster, as well as severe competition and internal disturbance related to the global megatrends” (Oak, 2014, p. 116). In other words, resilient communities are more likely to overcome negative lock-ins imposed from a variety of structural, political, economic, and/or social/psychological factors. According to Oak (2014),

Resistant regions can easily recover from the shock and evolve either through a dynamic process or a reinforcing path. In the case of the dynamic process, conversion, layering, and recombination will be continued to move toward the reorientation and renewal of the local economy; meanwhile, in the reinforcing path, competitive industrial and economic structure can be reinforced to sustain the economy either by specialization and diversification. The reinforcing path may result in the rigidification of the structure and industrial stasis or decline in the long term (p. 117).

Hence, innovation is fundamental to revitalizing disadvantaged rural regions. Zukauskaitė and Moodysson (2016) suggest that resource dependent communities either *renew* or *create* new pathways, or fail to differentiate from their traditional development trajectory. Those that engage in *path-renewal*, incorporate learning and the creation of a new knowledge base to existing industry (Hassink, 2005). Alternatively, *path-creation* sees the emergence of a drastically

different path, developed through the incorporation of knowledge *and* innovative-industry (Zukauskaite and Moodysson, 2016).

According to Frenken et al (2012), innovation comes in two forms: branching and recombination. Branching innovation occurs when existing technology innovates to “create a new technology that “branches” from the old one” (p. 27). In the latter case, recombination involves the adoption of an array of technology that, together, creates an improved version of the original technology (Frenken et al., 2012). Others point to “branching innovating trajectories”, as a process “in which regional assets recombine with new resources potentially leading to path creation” (Steen and Karlsen, 2014, p. 134). However, both Frenken et al (2012) and Steen and Karlsen (2014) would agree that innovative processes may result in path *renewal* or path *creation*; the former being an outcome of the revival and rejuvenation of an “old path”, whereas the latter involves an “old paths” engagement in new activities (Steen and Karlsen, 2014, p. 134).

To address these processes of innovation, Martin (2010) proposes three key mechanisms that give rise to innovative trajectories: *layering*, *conversion* and *recombination*. In need of further clarification, Steen and Karlsen (2014) build on these mechanisms in a regional development context. First, *layering* is a process of continuous reconfiguration of an existing business community, typically associated with the introduction, revitalization, or departure of enterprise. An important component of *layering*, according to Steen and Karlsen (2014), is spin-off firms, as they give rise to the “processes of specialization and diversification, and may thus contribute to the renewal of existing paths and the creation of new ones” (p. 135). As such, *layering* may provoke existing firms to reinvent themselves, through *conversion*, to stay relevant with regional markets. Thus, *conversion* implies that existing firms engage in innovative product and/or service development to remain competitive and adapt to surrounding conditions (Steen and Karlsen, 2014). Together, *layering* and *conversion* processes are interconnected, “such as when new firms employ novel technology or business organization, which in turn may have spillover effects on established local firms” (Steen and Karlsen, 2014, p. 135). Finally, *recombination* “refers to how historically developed resources and competencies may be recombined with new ones to form purposeful deviations onto new paths” (Steen and Karlsen, 2014, p. 135). This process typically involves “radical innovation” (Steen and Karlsen, 2014, p. 135), and is described as “a system of resources and properties that actors can recombine and

redefine, in conjunction with new resources and properties, to produce a new structure” (Martin, 2010, p. 15).

Entrepreneurship is viewed as a driver of economic change (Siemens, 2015). In the context of path dependent regions, entrepreneurship “is seen as resulting from the interaction between entrepreneurs’ prior knowledge that allows them to recognize certain opportunities...and the capabilities and opportunities embedded in the local environment” (Brekke, 2015, p. 205). As such, firms that integrate a region’s “vital heritage” (i.e. old foundations) (Steen and Karlsen, 2014, p. 134) and “existing regional knowledge” have a greater chance of surviving, as “entrepreneurship results from reproduced structural or regional conditions” (Brekke, 2015, p. 205). In addition, social (e.g. experiences) and cultural (e.g. skills) capital, combined with networks, collaboration and institutional support, can breed new forms of business activity needed to transform regional conditions (Grancelli, 2003). Some find that counterurbanites possess externally-accumulated capital (e.g. knowledge, networks) that promotes new forms of rural development (neo-endogenous) (Kalantaridis, 2010; Steel and Mitchell, 2017).

In the context of regional development, path dependence is a tool that can help explain the evolution of economic landscapes of industrial communities. Path-renewal and path-creation are influenced by historic events, and may evolve through processes such as layering, conversion, and recombination. Barriers to alternative pathways are many. Some are structural, political, economic, and social/psychological-related, and are often referred to as negative ‘lock-ins’. Creating resilient communities is an overarching goal of regional development. Over the years, different approaches have been employed to create resilient rural areas. These approaches include: exogenous, endogenous, and neo-endogenous development trajectories (High and Nemes, 2007). The following section addresses these approaches to rural development.

### **2.2.3 The Approaches to Change**

Rural areas evolve differently depending on the type of development approach. Traditionally, rural areas were influenced much by exogenous factors. Over time, endogenous forms of rural development emerged from disadvantages associated with neoliberalism. More recently, many rural areas have adopted neo-endogenous growth strategies that see extra-local



factors and networking as crucial to strengthening endogenous-based approaches. These types of rural development are outlined below.

### **2.2.3.1 Exogenous Development**

Pre-1970s, rural development took a “top-down” approach aimed to modernize regions faced with globalization (Murdoch, 2000). This top-down or state-centred approach is commonly known as exogenous development (Murdoch, 2000). According to Terluin (2000), the core components of exogenous growth strategies are that “rural development is considered as being transplanted into particular regions and externally determined, that benefits of development tend to be exported from the region, and that local values tend to be trampled” (p. 26, cf. Slee, 1994).

In the post-war period, exogenous approaches aimed to develop growth poles (van der Ploeg and Long, 1994), which were “driven, enabled, and implemented by stakeholders with external origins” (Mitchell and O’Neill, 2016b, p. 1020). In Canada, this method of development was linked to Keynesian forms of rule, which “gave rise to space-based industrial landscapes that exploited resource-based comparative advantage” (Mitchell and O’Neill, 2016b, p. 1020). This model treated resource-plentiful regions as “dependent (technically, culturally and economically) to urban centres, while the main function of rural areas was to provide food for the ever-expanding urban populations” (Gkartzios and Scott, 2014, p. 243). According to van der Ploeg and Long (1994), external:

...elements (such as technologies, organization forms, capital) and intervention (heavy subsidizing so as to create the required conditions for ‘modernization’, technical assistance and control to secure the correct application of the design model) compose the crucial features of such an exogenous approach to growth and development (p. 11).

In some areas, industrialization led to the consolidation of farm operations and restricted the amount of labour typically required for small-scale production (i.e. family farm) (van den Dries and Portela, 1994). In other locales, such as Newfoundland, Canada, federal and provincial government policies “oriented toward proletarianization of the Newfoundland labour force by moving people out of the fishery and making them “dependent and mobile laborers available to industrial capitalism (Antler and Faris, 1979, p. 130) at the lowest wages possible” (Anderson, 1979, p. 3). Inevitable out-migration signified the need to introduce alternative employment options in rural areas. Exogenous development thus focused on modernizing rural areas by

increasing the mobility of labour and capital (i.e. investing in new types of firms) (Lowe et al., 1995). Manufacturing was viewed as a way to counteract the loss of traditional economic activity. As a result, manufacturing companies created branch plants in rural regions to service urban areas (Lowe et al., 1995). Spin-off infrastructure and “improvements in transportation and communication links” were anticipated to follow the development of rural branch plants (Lowe et al., 1995, p. 90).

Post-1970s, exogenous approaches were condemned for creating dependent, distortive, destructive and dictated development (Galdeano-Gómez et al., 2010). It also became evident that exogenous models of rural development were not sustainable for economic growth. Development “centred on economies of scale and concentration”, creating a lack of industrial diversification (Galdeano-Gómez et al., 2010, p. 58). In addition, there were growing concerns about the damage that industrial concentration and specialization had on ecological systems (Woods, 2011), particularly in growth pole regions (van den Dries and Portela, 1994). Table 2.1 illustrates key components of exogenous development models proposed by Lowe et al (1998, p. 7).

**Table 2.1** Exogenous Model of Rural Development

Key Principal	Economies of scale and concentration
<b>Dynamic Force</b>	Urban growth poles Primary forces of development generated from outside rural areas
<b>Function of rural areas</b>	Food and other primary production for the expanding urban economy
<b>Major rural problems</b>	Low productivity and peripherality
<b>Focus of rural development</b>	Agricultural industrialization, modernization and specialisation Attracting new forms of labour and capital mobility

Adapted from: Lowe et al (1998, p. 7)

Important to note, is that exogenous growth models perceive rural areas as resource banks to accommodate urban areas. Furthermore, a “top-down” approach focused on modernization and increased productivity, which resulted in higher mechanized inputs and a reduced demand for local labour. According to Galdeano-Gómez et al (2010), criticisms of exogenous development models include: rural dependence on subsidization, political decision-making was externally controlled (e.g. government, large corporations) development was distorted by

focusing on mono-industrialisation instead of diversification, and development was dictated and manipulated by “external experts”, which proved destructive to the cultural and natural environment (p. 58).

In response, an endogenous approach to development was adopted. This approach focuses on “bottom-up” strategies to combat growing rural disparities related to forces of globalization and modernization. Endogenous development also aims to elevate the problems associated with the top-down exogenous styles of rural governance mentioned above.

### 2.2.3.2 Endogenous Development

Around the 1980s, endogenous models were adopted to counteract the problems associated with exogenous development. Endogenous development was a response to the challenges involved with neoliberalism: the states withdrawal of subsidies, and largely hands-off, bottom up approach to rural governance (North and Cameron, 2003). This strategy aims to create self-sustaining regions and minimize rural dependence on corporations and the welfare state (Bowler, 1999). In Ray’s (1998) own words, endogenous development is an “attempt by rural areas to localize economic control – to (re)valorize place through its cultural identity” (p. 3). This is accomplished in circumstances where local actors are the drivers and implementers of change. In other words, endogenous development is a community-based approach that depends on local resources to enable developmental goals (Mitchell and O’Neill, 2016b). Table 2.2 outlines the key components of endogenous development proposed by Lowe et al (1998).

**Table 2.2** Endogenous Model of Rural Development

Key principal	Place-based resources (natural, human and cultural) are fundamental to a sustainable development trajectory
Dynamic force	Local initiative and enterprise
Function of rural areas	Diverse service economies
Major rural problems	The limited capacity of areas and social groups to participate in economic and development activity
Focus of rural development	Capacity building (i.e. capital)  Building on skills, institutions and infrastructure Overcoming social exclusion and peripheral disadvantages

Adapted from Lowe et al (1998, p. 11)

van der Ploeg and Long (1994) explained that endogenous growth strategies are “founded mainly, though not exclusively, on locally available resources, such as the potentialities of the local ecology, labour force, knowledge, and local patterns for linking production to consumption” (p. 1-2). Similarly, others suggest that “endogenous approaches are based on the assumption that the specific resources of an area (natural, human, and cultural), hold the key to its sustainable development” (Galdeano-Gómez et al., 2010, p. 58) (see Table 2.2). Lowe et al (1995) contend that endogenous models differ from exogenous models because “the overall consideration is the extent to which individuals and groups are the object or the subject of development” (p. 94). Endogenous development, thus, encourages “local actors to work together to find innovative solutions to rural problems which could reflect what is best suited to their areas” (Shucksmith, 2008, p. 69) (i.e. place-based, see Table 2.2). This approach focuses on the use of local knowledge to avoid further development errors, and encourages local populations to participate in, and contribute to, strategies of rural reform (Shucksmith, 2008). According to Marsden (1998), endogenous development entails that rural areas “look after themselves” (p. 107).

Some refer to bottom-up approaches as “community-based initiatives” or “partnerships”, which centre on territorial (i.e. rural, place-based) as opposed to sectoral (i.e. agriculture, space-based) development (Shortall and Shucksmith, 2001, p. 122). A key feature of territorial development is the importance placed on economic *as well as* social capacity building. Bottom-up strategies aim to strengthen aspects of social and community development that are typical of disadvantaged regions. For example, many rural areas lack the ability to transition away from primary sector employment (e.g. lack of alternative options or skills) (Shortall and Shucksmith, 2001). As such, the goal of social development is to empower local actors to engage in community ownership and management of local resources and, to facilitate the reinvention of communities in economic transition (Okkonen, 2008) (i.e. service economies, see Table 2.2).

According to Ray (1999), this approach “looks inwards to discover, recover or invent the identity of the territory, from which resources to drive and define development can be generated. The primary sources of this identity (or identities) will be cultural, historical or physical (landscape/architecture)” (p. 259). Territorial resources, or as Ray (1998) suggests, “cultural markers”, may be used as tools to create a place-based identity (p. 3). This is successful if, or when, combined with entrepreneurship and capital (Ray, 1999). To this end, rural territories have

the potential to capitalize on place-based endogenous assets for cultural heritage tourism consumption (Gale et al., 2013). This process is explained by Jenkins (2000),

Redistribution of economic activity away from rural areas, particularly from marginal regions, has resulted in a renewed search by consumers for ‘authenticity’ and for products and services associated with tradition, heritage and culture, and this represents a potential marketing opportunity for regions able to differentiate their outputs appropriately (p. 306).

Rural regions may differentiate using a place-based approach. A place-based approach is confined to a specific geographical space. Unlike rural spaces, place-based development is made possible by exploiting certain elements unique to that area (Barca et al., 2012). This approach also requires the input of local knowledge for cultural heritage interpretation. Therefore, place-based assets become economic *and* social assets to the local community (Barca et al., 2012).

Yet, endogenous approaches are not without problems. For example, local communities often lack the capacity to develop without extra-local capital (Barke and Newton, 1997). Shown in Table 2.2, many rural areas are marginalized because of their peripheral or remote location, which puts them at a disadvantage in terms of receiving external resources (i.e. capital) (Siemens, 2012). What is more, without extra-local influence, rural areas may experience “introspective embeddedness”, where “information and opportunities may become neglected due to the strength of ties and obligations within traditional social groupings” (Atterton et al., 2011, p. 259).

Although rural independence is a key factor of endogenous development, minimal support from external stakeholders can inhibit socio-economic progress (Gkartzios and Scott, 2014). Also, Shucksmith (2000) found that an uneven distribution of power can place limitations on endogenous goals. This is especially true if certain local groups control all the power (Laschewski et al., 2002), or if government is unable or unwilling to decentralize control to local populations (Miller, 2013). These concerns are addressed by Ward et al (2005), who argue that a mix of exogenous and endogenous development models “enhance the capacity of local areas to steer these wider processes, resources and actions to their benefit” (p. 246). Terluin (2003) describes the combination of exogenous-endogenous goals as multifaceted networks where “resources are mobilized and in which the control of the process consists of an interplay between local and external forces” (p. 333). In other words, a rural approach that centres on both exogenous and endogenous models aims to maximize the value and allocation of resources,

while maintaining a balance of control over development goals. This is supported by Bosworth et al (2016), who suggest finding a balance of “power relations that exist between the local and extra-local domains” is fundamental to achieving exogenous-endogenous or ‘neo-endogenous’ goals (p. 429).

Given the advantages and disadvantages of both exogenous and endogenous models, choosing one approach over the other is not beneficial for advancing rural development (Lowe et al., 1995). This idea is reinforced by Murdoch (2000),

...why do we have to choose? In circumstances where almost any development is hard to achieve there can be little sense in development agencies opting one approach over the other; rather, we should expect that combinations of both will, or should, be the norm. (p. 408).

With this in mind, neo-endogenous forms of governance warrant further discussion below.

### **2.2.3.3 Neo-endogenous Development**

Neo-endogenous development was first coined by Ray (2001), and is described as “endogenous-based development in which extra-local factors are recognized and regarded as essential but which retains belief in the potential of local areas to shape their future” (p. 4). This “new rural paradigm” (Krawchenko, 2016, p. 6) marks a shift from *rural government* to *rural governance*, where collaboration and partnerships of civic groups, entrepreneurs, regional government and local institutions are favoured over exogenous or endogenous goals alone (Giessen and Böcher, 2009). This is illustrated in Table 2.3, where multi-level governance is the driving force of neo-endogenous development.

**Table 2.3** Neo-Endogenous Model of Rural Development

<b>Key principal</b>	<b>Ensuring the needs of locals are met when competing for capital resources with extra-local stakeholders Local socio-economic and political stability</b>
<b>Dynamic force</b>	Facilitating rural-urban networks and local-global linkages Establishing multi-level collaboration and governance
<b>Function of rural areas</b>	Sustainable livelihoods Preserving natural capital Mix of primary and tertiary activity (production and consumption)
<b>Rural problems</b>	Exclusive regions Neoliberal decentralization and minimal regulation
<b>Focus of rural development</b>	Place-based development Capacity building Social <i>and</i> economic goals (e.g. community building, civic sector participation) Diversification in avoidance of negative lock-ins

Adapted from: Gkartzios and Scott (2014, p. 260, cf. Lowe et al., 1998)

The new rural paradigm emphasize the importance of networks (Table 2.3). Castells (1996) claims that cultural resources are network nodes that can be situated within the network society. This is, however, only effective once a territory assumes a “cultural identity” (Bosworth and Atterton, 2012, p. 257). A “network society” is described as a social structure in the form of “interaction between social organisation, social change, and a technological paradigm constituted around digital information and technologies” (Castells, 2004, p. 27). In a network society, access to urban-rural linkages is necessary for circulating information and extending economic development to rural areas (Castells, 2004). Endogenous goals alone are often capital-deficient (Mitchell and Madden, 2014), making it “difficult for groups to create such networks and related opportunities on their own” (Krawchenko, 2016, p. 14). Therefore, external stakeholders with extra-locally accumulated capital can strengthen urban-rural linkages and build local capacity (Table 2.3). According to Shucksmith and Atterton (2017),

Critical to the socio-economic development process are those institutions, actors and networks that have the capacity to link businesses, communities and institutions involved in governance at a variety of scales. Networked (i.e. neo-endogenous) development thus advocates an emphasis on local capacity building, but recognizes in addition the essential role of the state and other external actors (p. 304-05).

Urban areas of the developed world are highly interconnected and considered “hotspots” of the network society. As such, urban-rural linkages are increasingly important to bridge external-capital with local resources. In other words, access to networks is vital to meeting economic and social goals of neo-endogenous development, as “connectivity with extralocal factors enables local development to take advantage of new technological, learning, and trading opportunities from outside while continuing to build stocks of local capital and reinforcing and communicating local identities” (Bosworth and Atterton, 2012, p. 257).

Rural in-migration is one way that private investment into local resources can benefit a host community (Petrick, 2013). For example, Mitchell and Madden (2014) suggest that counterurbanites “help to construct a territorial identity by creating new ventures that combine their externally accumulated capital (financial, social, or cultural) with local resources (e.g. historical and cultural assets)” (p. 146). Their study of rural Nova Scotia, Canada, found evidence of this, where rural in-migrants are engaging in recombination of local assets and extra-local capital, while also stimulating neo-endogenous growth. This was achieved through the creation of local employment and capacity building (e.g. transfer of knowledge and skills) (Mitchell and Madden, 2014).

Local resources such as culture and environmental capital are said to be “marketable characteristics” for rural businesses elsewhere (Bosworth and Atterton, 2012, p. 257). What is more, Murdoch (2006) claims that “regional economic networks are emerging in the wake of counter-urbanization-led economic change in the countryside” (p. 176). Others support this claim, arguing that rural in-migrant entrepreneurs “have the ability to mobilize local resources and to exploit non-local opportunities through network relations linked to their previous places of work and residence” (Atterton et al., 2011, p. 260). As outsiders, rural in-migrants are also more likely to recognize opportunities for private investment, and have higher education levels, greater entrepreneurial skills, and surplus financial capital, as oppose to local residents (Naudé et al., 2017). In addition, Bosworth (2006) found that counterurbanites contribute to the knowledge economy in rural areas by bringing with them innovative concepts and experiences.

In short, neo-endogenous development is based on the idea that extra-local influences are fundamental for sustaining rural livelihoods. Counterurbanites contribute to neo-endogenous development through private investment and externally-accumulated capital. They also strengthen urban-rural networks because of their external connections. Thus, the following



section explores the role of counterurbanization in rural development. To accomplish this, an overview of the nature of counterurbanization, motivations for urban-rural relocation, and types of rural-migrants, is provided. It concludes with a discussion of counterurbanization-led neo-endogenous development.

## **2.3 Counterurbanization**

In recent decades, a rising number of people are relocating to rural areas. As such, there is a growing body of literature on rural in-migrants: where they are from, their characteristics and motivations for moving to a rural area, and their impacts in host communities. At the same time, entrepreneurial in-migration is becoming increasingly popular in the countryside. Many studies focus on this trend in relation to tourism and lifestyle enterprises. The following section examines these topics.

### **2.3.1 Types of Migration**

In the 1970s, academics began to witness a rural population turnaround (Beale, 1975; Berry, 1976). First recognized in the United States, this trend of urban population redistribution to rural settlements has become a widely studied event in much of the Western world. Mitchell (2004) suggests that “between 1970 and 1974, for example, American non-metropolitan and metropolitan areas grew by 5.6% and 3.4% respectively, contrasting significantly with levels recorded only a decade earlier (of 4.1% and 17.1%)” (p. 15). However, a study by Burchardt (2012) indicates that rural population growth may have been occurring much earlier than the 1970s. For example, between 1901 and 1950, Berkshire’s rural districts in Southern Europe witnessed a 54.0 percent increase in population (Burchardt, 2012, p. 155). Additional studies indicate that in recent decades, rural populations have been increasing in other areas of the developed world, such as Australia (Smailes and Hugo, 1985), Canada (Dahms, 1980; Dahms and McComb, 1999; Joseph et al., 1988; Mitchell, 2004), and in much of Europe (Bosworth, 2009; Champion, 1989; Fielding, 1982; Hoggart and Paniagua, 2001a).

Rural population growth is associated with different migration types. Furthermore, rural in-migration types vary depending on the location, and size, of the departing destination (e.g. international, seasonal, lateral). For the purpose of this study, counterurbanization (newcomer and returnee) is the migration type explored. It is acknowledged, however, that lateral migration

(rural to rural) is also associated with changing rural population demographics (Stockdale, 2016). Woods (2009) defines counterurbanization as “the movement of population from urban to rural areas, normally associational with urban to rural migration but also produced by differential rates of population growth” (p. 429). Mitchell (2004) explains that counterurbanization has been viewed as both a “migration movement”, and, as a “process of settlement change” (p. 17-18). As a migration movement, it is defined as “the relocation of urban residents from large (often metropolitan) to small (often non-metropolitan) spaces” (Mitchell, 2004, p. 17). On the other hand, following Berry’s (1976) interpretation, “counterurbanization then becomes equated with the transition of a settlement system from a state of concentration to one of deconcentration” (p. 18). Following Mitchell (2004), this study is concerned with counterurbanization as a migration movement, as it seeks to uncover various types of urban to rural moves, and the motivations responsible for these migration types.

As such, various terms are used to define the type of rural in-migrant move, and their motivations for relocation. Mitchell (2004) presents three distinct types of counterurbanites that are motivated to live in rural areas for different reasons. First are the “well-to-do urbanites” (Spectorsky, 1955, p. 7) who relocate to the countryside but retain “their ties to the city through their daily commute to work” (p. 23). A second type of counterurbanite is one who has been “displaced” for reasons associated with cheaper living or alternative employment opportunities (Mitchell, 2004, p. 23). The third type of counterurbanite is that of the “anti-urbanite” who rejects city life on the account of a number of push and pull factors (Mitchell, 2004, p. 23). Push factors for “anti-urbanization” may include crime or congestion, whereas pull factors are linked to things such as desirable rural landscapes and preferable slow-paced conditions, which include working environments (Mitchell, 2004, p. 24). Anti-urbanization migrant cohorts may be part of the “back to the land movement” that reflects the desire to pursue a new and improved lifestyle (Mitchell, 2004, p. 24).

Regardless of migrant-type, modern day mobility is causing an increase in rural-urban and urban-rural travel, and an expanding context for such moves (e.g. tourism, commuting, short-term migration). According to Rye (2015), “mobility streams take various *forms* (distance, durability, locations, degrees of performance, and circularity)”, but are also “constituted by various *kinds of actors*, often with highly differing motivations, resources, and objectives” (e.g. amenity, labour) (p. 166). As modern-day life adapts to being constantly “on the move” (Urry

2002, p. 256), “corporeal mobility has become central to many lifestyle choices, with patterns of such mobilities becoming more dynamic and complex than in the past as individuals use mobility choices to negotiate the growing complexity of modern living” (Cohen et al., 2015, p. 155-56). Consequently, a fundamental component of mobilities involves the choices behind people’s migration choices. Further motivations are explored below.

### **2.3.2 Migration Motivations**

In many studies, urban to rural migration is examined in terms of motivations (Arnon and Shamai, 2010; Bolton and Chalkley, 1990; Jones et al., 1986). Changing migration patterns are reflective of the “new mobilities paradigm”; an era where Sheller and Urry (2006) claim “All the world seems to be on the move” (p. 207). The movement of people is a key characteristic of the mobilities era, as increased travel frequency and types of migration choices (e.g. seasonal, short-term) evolve with modern day lifestyles (Urry, 2000). Cohen et al (2015) assert that physically embodied “mobility is increasingly influenced by and through transnational ties changing sociocultural outlooks and technologies of transport, communication and social connectivity that characterise a (re)formation of the everyday” (p. 155). For example, increasing flexibility in the workplace (e.g. non-stationary or non-fixed job sites) (Promes, 2017), and technological advancements (e.g. broadband internet in rural areas) (Carson, 2013), has made it easier for people to live in sparsely populated areas. More recently, non-corporeal qualitative aspects of the mobilities era, such as place-identity and social-economic elements concerned with migration, are being discussed (Halfacree, 2012; Urry, 2007). As a case in point, Whitson (2006) states “With leisure time and disposable income becoming more widespread in the affluent countries of the world, consumption and “lifestyle” choices are becoming increasingly important in the definition of personal and collective identities” (p. 488). Time-space compression, proposed by Harvey (1989), reduces spatial and temporal distances, as improved transportation and technology enables family members to remain connected to community ties from afar. For example, more frequent visits to ones’ hometown, or communication via virtual tools, facilitate greater familial interaction between members who moved away and those that remain at home (Kilkey and Palenga-Möllenbeck, 2016).

Changing social and economic circumstances has led to an influx of return migrants to rural regions. For instance, Ní Laoire’s (2007) research found that many participants returned

home to be near to aging parents, or to reconnect with community ties. Other migrants return for reasons relating to economic circumstances. Bolton and Chalkley (1990) suggest that jobs and cheaper housing can influence returnees. Other studies indicate that many returning migrants, that left due to a lack of opportunities and poor economic conditions (Stockdale, 2002), are those in retirement (or pre-retirement) who enjoy more financial freedom in later life (Stockdale and MacLeod, 2013). In other words, if permitted, many return to rural areas for personal lifestyle-related endeavours.

Lifestyle mobility is defined as “those mobility practices undertaken by individuals based on their freedom of choice, of a temporal or more permanent duration, with or without any significant ‘home base(s)’ that are primarily driven by aspirations to increase ‘quality of life’ and that are primarily related to the individuals’ lifestyle values” (Åkerlund and Sandberg, 2015, p. 353). According to Åkerlund and Sandberg (2015), retirees (returnees and newcomers) are commonly associated with this lifestyle mobility definition. What is more, an increasing number of people flock to rural landscapes for tourism, recreation and leisure (that may or may not be in the retirement stage). This is illustrated in many parts of rural Canada, where an abundance of natural resources, such as forests, lakes, and mountains, formally tied to traditional economic industries, are now perceived as amenities for tourism consumption (Whitson, 2006). For example, recreational resources, such as the Rocky Mountains in British Columbia, plentiful lakes in Ontario and Quebec, and coastal areas on the Eastern and Western shores of Canada, produce a healthy supply of activities (e.g. golfing, mountain climbing, watersports) fancied by amenity-seeking tourism migrants in search of a “value added” lifestyle (Whitson, 2006, p. 491).

To some, lifestyle migration is somewhat synonymous with amenity migration (Pavelka, 2017). Benson and O’Reilly (2009) clarify this, suggesting lifestyle migration has long been employed as an umbrella term for other migration typologies in line with the lifestyle narrative (e.g. retirement migration, leisure migration, or amenity migration). Despite terminology used to describe migration performances in search of a “better way of life”, Benson and O’Reilly (2009) determine that lifestyle migrants “are relatively affluent individuals of all ages, moving either part-time or full-time to places that, for various reasons, signify, for the migrant, a better quality of life” (p. 609).

However, rural areas with rich natural environments, such as mountainous regions (Gripton, 2009; Löffler et al., 2014; Löffler et al., 2016) and coastal areas (Crawford et al.,

2013), are sought by “amenity migrants”, who are typically drawn to tourism infrastructure, and are most likely seasonal travellers and second or multiple home-owners (Kuentzel and Ramaswamy, 2005; William and Gill, 2006). Seasonal and second home-owner migrants often return to the same destination signifying that mobility “is inherently circular and repetitive” (Rye, 2015, p. 166). Others, too, differentiate amenity and lifestyle migration (Vuin et al., 2016). Vuin et al (2016) purport that “Amenity migration describes the movement motivated by place-based destination attributes, such as natural, aesthetic, recreation or cultural amenities” (p. 136). In contrast, lifestyle migration “focuses more on individuals” subjective motivations around particular destinations “pull factors”, and “does not rely exclusively on place-based amenities” (Vuin et al., 2016, p. 136). Rather, they argue that lifestyle migration involves “a more complex mix of social, economic and/or political motivations relating to individual interpretation of a ‘good life’” (Vuin et al., 2016, p. 136). One rural “pull factor” gaining attention in the literature, is the production-led opportunity to open a lifestyle tourism business (Ateljevic and Doorne, 2000; Eimermann, 2016; Stone and Stubbs, 2007; Tuulentie and Heimtun, 2014; Wang et al., 2015).

Williams and Hall (2000) describe tourism migration as consumption-led *and* production-led. Consumption-led tourism migration is related to retirement and vacation homes. In contrast, production-led migration is associated with rural entrepreneurship, and the desire to pursue business opportunities that fit a rural lifestyle (Williams and Hall, 2000; Williams and Gill, 2006). Both consumption and production-led tourism migrants are attracted to high-amenity areas (e.g. mountainous regions, tourism infrastructure) (Williams and Hall, 2000). However, Müller (2006) found that not all lifestyle migrant entrepreneurs become involved in tourism businesses upon arrival. Rather, consumption-led motives often draw migrants into rural tourism areas, who then become involved in production-led activities (Müller, 2006).

Bosworth and Farrell (2011) suggest that pull factors of a rural amenity landscape “provides alternative motives for potential entrepreneurs who are often less driven by growth and profitability and more by personal and lifestyle choices” (p. 1475). Moreover, they define tourism lifestyle entrepreneurs as “tourism business owners seeking a different type of lifestyle”, whose motivations stem from improving their quality of life over profit (Bosworth and Farrell, 2011, p. 1475). Bosworth (2010) described this phenomenon as ‘commercial counterurbanization’, which is explained in more detail hereafter.

### 2.3.3 Commercial Counterurbanization

Lifestyle migration is commonly a result of ‘push-pull’ factors that inspire urbanites to relocate to improve the quality and conditions of their lifestyle; these may range from economic (e.g. reduced cost of living, more financial freedom) (Spalding, 2013) to non-economic reasons (e.g. volunteer opportunities, sense of community) (Thulemark, 2011). Though rural in-migration may depend more heavily on improving one’s life, Eimermann (2015a) found that in post-migration, many “economically active family migrants employ their creativity to consciously pursue their aspired post-migration lifestyle” (p. 88). Furthermore, Eimermann (2015a) suggests that in-migrants are encouraged to find creative employment options because of the lack of alternative sources of income. Many migrants work other jobs in the off-season and pursue their lifestyle business (e.g. B&B) in the summer season (Eimermann, 2015a). These types of migrants are also interpreted by Vuin et al (2016), who suggest that “high amenity” areas (scenic environments and established tourism destinations) attract “active migrants” (p. 135). They define “active migrants” as those who “contribute locally through employment, business development, knowledge transfer or social and volunteer engagement” (i.e. entrepreneurs and/or volunteers) (Vuin et al., 2016, p. 135).

Bosworth (2010) described this phenomenon as “commercial counterurbanization”; defined as “the growth of rural economies stimulated by inward migration. This may take the form of business creation by rural in-migrants, their employment in other rural firms, or their promotion of other businesses through local trade, knowledge exchange, and cooperative working” (p. 977). The phenomenon occurs in the north east of England, where in-migrants own over fifty percent of small businesses, and employ far more people than the entire agricultural industry (Bosworth, 2010). As such, commercial counterurbanization is “an emerging force in rural economic development” (Bosworth, 2010, p. 966).

Bosworth (2009) identifies planned and unplanned rural in-migrant business owners; also suggesting that not all rural migrant entrepreneurs relocate with the intention of opening a firm. This suggests that some lifestyle migrants may first consume, and later produce (and consume) in rural amenity-rich landscapes. Those that planned to start a rural business, however, did so “either to undertake an activity the owner-manager enjoys or to achieve a level of activity that provides adequate income” (Peters et al., 2009, p. 379). Contrary to growth enterprises, “lifestyle entrepreneurs accept suboptimal levels of production”, and are chiefly motivated “to enjoy the

perceived quality of life and do something on the side, to sustain a certain lifestyle and economic status” (Peters et al., 2009, p. 379).

Other studies confirm that many rural lifestyle migrants aspire to participate in the local business community for ‘lifestyle’ reasons (Dawson et al., 2011; Siemens, 2010; Vuin et al., 2016). Dawson et al (2011) claim that “tourism industries tend to attract a substantial number of “lifestyle entrepreneurs”, due to the fact that these industries are located in attractive areas and are thought to provide a “nice life”” (p. 551-52). In addition, lifestyle entrepreneurs in the tourism industry are more inclined to be involved for social and cultural motivations as opposed to profit and growth (Eimermann, 2015a). Some indicate that financial motivations may arise out of necessity to afford to live in a rural area. The work of Vuin et al (2016) finds “entrepreneurial in-migrants may be “lifestyle entrepreneurs” who run tourism businesses to finance desired lifestyle aspirations without aspirations for economic growth” (p. 137). Siemens (2010) claims that some rural migrant entrepreneurs use their business as a financial mean to enable them to remain in a rural area. For example, in parts of rural Canada, entrepreneurs are inclined to “define business success primarily in lifestyle terms, rather than financial ones” (Siemens, 2010, p. 70). To understand who these counterurbanites are, the following sections explore types of rural in-migrants.

### **2.3.4 Types of Rural In-Migrants**

Counterurbanites can be divided further into newcomers and returnees, who may be seasonal or permanent migrants<sup>6</sup>. The following sections define each type of counterurbanite. Their impacts on rural communities are also discussed.

#### **2.3.4.1 Return Migrants**

Return migration, defined by Gmelch (1980), is “the movement of emigrants back to their homelands to resettle” (p. 136). Though this definition includes returnees to both urban and rural areas, Gmelch (1980) identifies “rural hinterlands within industrialized regions” at the forefront of this movement, with the majority of emigrants having roots in rural and remote areas (p. 136). More exclusively, Bosworth (2009) defines return migrants as “those who grew up in

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<sup>6</sup> Permanent migrants should be assumed as those in both “newcomer” and “returnee” categories. However, over time, seasonal migrants are also known to relocate permanently.

the area and returned in adult life” (p. 666). Ní Laoire (2007) argues that counterurbanization literature has largely excluded rural return migration as a distinct component of this phenomenon. Alternatively, they suggest, return migration may provide further insight into the “classic local-incomer dualism” associated with changing rural demographics (p. 332). Others agree that counterurbanization has maintained a clear distinction of local population or newcomers (Allan and Mooney, 1998). This dual categorization is problematic, as pointed out in Philips’s (1986) study, where rural respondents identified as other than local or newcomer.

In recent decades, von Reichert et al (2014) find that non-metropolitan regions in the United States are experiencing increasing rates of return migrants. Their study focused on return migration of people to their hometown, typically following years spent away at school and/or working in urban areas. Others, too, have documented the return of rural dwellers to New Zealand (Sanderson, 2009), Australia (Newbold and Bell, 2001), Europe (Barrett and Trace, 1998; Gmelch, 1980; Hoggart and Paniagua, 2001a; Rodríguez et al., 2002), Canada (Richling, 1985), and the United States (Fuguitt, 1985; Lee, 1974).

Sanderson (2009) suggests that while there are a variety of motivations for return migration, “emotional attachments are often equally important in the decision to return home” (p. 296). Others find that the majority of rural returnees do not return home out of economic need, but rather to reconnect with family and other social ties (King, 2000). Also, it is common for migrants to move back to their home community because of their strong attachment to that place, and identity with that space (Jones, 1999). Lidgard (2001) found that many returnees are motivated by the desire to raise their children in their native regions. While some aspiring to achieve academic opportunities, report intentions of returning prior to emigration (Newbold and Bell, 2001).

von Reichert et al (2014) point out the benefits that return migrant have on declining rural areas, and the impact that their accumulated capital from urban areas has on the communities they return to. Of interest is the leadership role that return migrants gravitate to in civic sector activities. Moreover, they found a high proportion of return migrants engage in volunteering because of the perceived “difference” they can make in rural communities, as opposed to metropolitan environments (von Reichert et al., 2014, p. 217). Bai et al (2016) indicate that some rural returnees travel internationally for several years, and return to their respected country to open a business. As such, Bai et al (2016) claim that they tend to acquire greater skills and gain



access to social and human capital that often enables them to open innovative firms and have increased access to external networks. In addition, returnees with previous ties to the community may receive greater positive reception from local residents than newcomers (Stockdale, 2006), and contribute to the “economic, social and cultural vitality of local rural communities” from their diverse life experiences and social networks (Farrell et al., 2014, p. 128).

A study by Gaddefors and Cronsell (2009) discovered that rural “returning entrepreneurs” become more easily embedded within a local community (p. 1199). They suggest that returnees have an advantage because of their local knowledge and ties to the community, which “gives the entrepreneur a fair chance to make a realistic evaluation of how his life will turn out in the region” (Gaddefors and Cronsell, 2009, p. 1199). However, not all scholars agree that returnees have an easy transition back into the community, as “the ‘home’ left behind may have changed, and the return migrants themselves were likely to have changed” (Hall et al., 2017, p. 236). In some cases, (e.g. Farrell et al., 2014) return migrants experience social exclusion or isolation. However, this is largely dependent on the length of time spent away, and the “return migrant’s ability to maintain strong links with the home country, which in turn acts as preparation for the return process” (Farrell et al., 2014, p. 130).

#### **2.3.4.2 Newcomer Migrants**

Newcomer migrants are commonly referred to in counterurbanization literature (Ní Laoire, 2007); however, there is little consensus of how they are defined (see Qin, 2016). Some suggest that newcomers are determined based on length of time spent in the community (e.g. 5 or 10 years maximum). For example, Fortmann and Kusel (1990) limit newcomers to a ten-year term, as migrants may become “socialized to local attitudes” the longer they reside in a host community (p. 217). Alternatively, Graber (1974) determined newcomer status based on the onset of significant rural in-migration (i.e. migration boom). Others define newcomers based on their recent urban living experience, and include return migrants as part of this category (Akgün et al., 2011). In some cases, researchers establish a timeframe cut-off for what constitutes a newcomer based on the limitations of the study (i.e. locations where in-migration is in its infancy) (Smith and Krannich, 2000).

Nevertheless, many associate rural newcomers with lifestyle motivations (Akgün et al., 2011; Costello, 2007; Holmes and Argent, 2016; Nelson, 1997). Such motivations are

considerably broad, as lifestyle migration is generally tied to a “quest for a better way of life” (Eimermann, 2015b, p. 68). Like returnees, newcomers also move to rural locations for the perceived quality of life it can offer their children (Schellenberg, 2011). For example, Schellenberg (2011) found that many newcomers from Germany (with origins in Russia) move to rural Manitoba, Canada, for the “rural lifestyle and sense of community”, that, for them, is associated with owning their own piece of land and sending their kids to rural schools (p. 278).

Patten et al (2015) suggest that “newcomers maintain a more synonymous persona to rural living, being clear that they are ‘not opting out of society’, but rather taking an opportunity to facilitate something more meaningful” (p. 132). For example, newcomers to rural Colorado, in the United States, take pride in local amenities such as historic burial sites, and “despite their short, or seasonal time there—have recognized these same sites and become attracted to them, at times trying to participate in preserving this aspect of the valley’s heritage” (Post, 2013, p. 337). Furthermore, Post (2013) argues that newcomers often aspire to become involved with the host community; however their outsider identity may impact their integration (Patten et al., 2015). Speaking to this point, tensions are common among local residents and newcomers, since migrants are perceived as agents of change (Marsden et al., 2005). As newcomers infiltrate “less well-serviced” and “un-gentrified” rural areas, they are accompanied with “new resources and establish new activity patterns” (Davies, 2014, p. 47). Starting a business may also be challenged by the lack of local social capital to permeate local information, local resources and networks (Lewis et al., 2011). Social networks are essential to small businesses “not only for the successful business dealings and enhancement of prestige but also as insurance against an uncertain future” (Cave et al., 2007, p. 437). Thus, having local support contributes to long-term business success.

Relatedly, growing concern towards rural gentrification is associated with newcomer migration. Newcomers in search of a lifestyle change are typically affluent and “privileged” as von Reichert (2011) suggests (p. 294). Therefore, they possess the financial capital to revitalize and construct rural properties to fit their middle to upper-class standards. Walker and Fortmann (2003) suggest that in rural Nevada, it is common to find “(multi-)million-dollar exurban leisure ‘ranchettes’ and luxury homes directly adjacent to struggling farmers or ranchers, contributing geographically to a sense of marginalization and exclusion in a gentrifying landscape” (p. 479). In terms of employment, local residents may be resentful towards newcomers as they have gone

from extractive resource high-wage jobs, to low-paid occupations in the service sector, such as housekeeping (Walker and Fortmann, 2003). However, some find that not all newcomers are significant drivers of rural gentrification. For example, Guimond and Simard (2010) found that in rural Quebec, Canada, “newcomers displayed a desire to preserve their privileged situation and limit the arrival of *other* groups, such as well-to-do newcomers, as well as tourist and second home owners or renters” (p. 459). This indicates that older newcomers may be resistant to other newcomers because they are seeking to preserve their desired rural landscape.

#### **2.3.4.3 Seasonal Migrants**

Several studies draw attention to the role of seasonal and second home-owner counterurbanites in the countryside (Gallent, 2015; Halfacree, 2012; Matarrita-Cascante et al., 2010). Pitkänen et al (2013) describe rural migration motives of second home-owners as relating to “quality of life, proximity to nature, recreation and escapism” (p. 144). Similarly, Halfacree (2012) implies that vacation home tourism involves the consumption of rural landscapes and a timeout from hectic urban environments. Hoggart and Paniagua (2001a) found that many rural in-migrants in villages in Spain are return migrants, some of whom in-migrate seasonally while others commute daily to their urban place of employment.

Seasonal home-owners approach to rural living, too, is often similar to local residents. For example, in many cases, short-term residents are invested in rural regions as they have come to be their part-time communities (Woods, 2011). It is also common for seasonal residents to become actively engaged in the community out of the desire to achieve a sense of belonging. For instance, Kaltenborn et al (2008) argues increasing flexibility and frequent visitation to part-time communities can cause temporary migrants to develop place-attachment. This is especially true considering that vacation homes are commonly inherited by younger generations (Kaltenborn et al., 2008). In some cases, place attachment is the reason why seasonal migrants relocate permanently (Lundmark and Marjavaara, 2013).

Rural second home-owners, unlike permanent rural in-migrants, engage in multiple rural to urban and urban to rural moves. Triandafyllidou (2013) describes this movement as “circular migration”, which can be important for understanding the impacts that repetitive seasonal migration has on host regions (p. 1). For example, seasonal migrants bring new capital to their second home community each time they return (Gallent, 2015; Satsangi et al., 2010). Gallent

(2015) suggests that “second home owners, in particular, are *instrumental* in building social capital within rural communities through a tendency to act as incidental bridges to extra-local resources” (p. 101). In this sense, seasonal migrants have the capacity to contribute to neo-endogenous develop via transfer of accumulated capital. For some communities, “second home owners’ presence can be perceived as a valuable compensation for a reduced full-time population by the remaining local residents” (Farstad, 2013, p. 318).

However, much attention has focused on the negative aspects of season migration/second home-owners. According to Gallent (2014), second home-owners are “more frequently viewed as a “curse” than a “blessing”” (p. 174). For example, seasonal residents are known to inflate property taxes and housing prices, which can displace local residents (Marcouiller et al., 2002; Müller, 2007). What is more, local residents often perceive second home-owners as outsiders. These outsiders, or “summer people”, are assumed to have “shallow and inauthentic connections” to members of the community (Stedman, 2006, p. 187). This is because local residents tend to minimize relationships with outsiders to keep the community “real” (Stedman, 2006, p. 187). This assumption that seasonal residents will interrupt the local landscape is problematic because it “denies the possibility that these “outsiders” may themselves experience important and significant attachment to place and may have helped create place with the passage of time” (Stedman, 2006, p. 187). In addition, second home-owners “represent a conceptual middle ground between year-round residents and nonrecurrent tourists” (Stedman, 2006, p. 187). To some (Müller and Marjavaara, 2012), second home-owners are “at the nexus of tourism and migration”, meaning they are debated as one or the other (p. 53). If thought of as repeat tourists, they may be an important link between non-repeat tourists and the local community.

Succinctly, seasonal residents may be categorised as counterurbanites if they engage in urban-rural migration. They are associated with negative (e.g. increased property prices) and positive (e.g. cyclical injection of capital) impacts. Second home-owners can also become attached to their place of residence, which, in turn, can add value to the local community (e.g. protect local environment) and facilitate resident and tourist communication (second home-owners are tourists themselves).

The following sections explore the development of cultural heritage tourism. More specially, the role of rural in-migrant business owners/operators in cultural heritage tourism is examined. Also discussed, is the relationship between rural in-migrants involved in the private

sector and neo-endogenous-led rural development. Finally, these issues are applied to the theory of path dependence.

## **2.4 Rural Cultural Heritage Tourism: A Pathway to Development?**

Tourism is an important economic driver of contemporary rural change (Bosworth and Farrell, 2011; Shannon and Mitchell, 2012; Woods, 2011). In some cases, tourism is heralded as an economic saviour to regions faced with declining primary sector industries (Baum, 1999; Fife, 2004a; Fife, 2004b; Markey et al., 2008; Seymour, 1980). This is because culture and heritage are perceived as assets to be capitalized on to provide economic alternatives to extractive industries. Neo-endogenous approaches see extra-local factors as facilitators of economic and social goals (Ray, 2001; Vanclay, 2011), such as injecting externally-accumulated capital and fostering urban-rural networks (Atterton et al., 2011; Bosworth et al., 2016). One extra-local actor gaining attention in the literature is the counterurbanite entrepreneur in search of a rural lifestyle (Ring et al., 2010). As such, cultural heritage tourism is discussed here in association with lifestyle entrepreneurship and neo-endogenous development.

There are myriad definitions of cultural tourism in the literature (Smith, 2015). Perhaps the broadest account originated from Urry (1990), who suggests tourism *is* culture. Others provide a more definitive description, such as Edwards (2013), who labels cultural tourism as one that “encompasses people who, in their leisure time, are to varying degrees seeking enjoyment, culturally motivated, wishing to gather new information and experiences, wanting to satisfy their human need for diversity, seeking to raise their cultural level and satisfy their cultural needs” (p. 13). Cultural tourism events are described by Smith (2015) as:

...the appreciation or consumption of visual arts and crafts; the performing arts; festivals; displays and performances at museums and galleries (art, historical, industrial); archeological and historical sites and interpretive centres; heritage districts in cities, including former industrial zones; educational facilities and retreat centres; agricultural and culinary resources; as well as spending time immersed in another culture, observing and perhaps interacting with local residents and institutions (p. 221-22).

Cultural tourism differs from other forms of tourism in that it centres on learning (e.g. understanding customs, beliefs, history) (McCarthy, 2012). Heritage tourism is a subset, or “often used interchangeably with”, cultural tourism (Kempiak et al., 2017, p. 375), and is concerned with “recycling the past via museums and monuments” (McCarthy, 2012, p. 260),

using “history as a resource” (Ashworth, 2010, p. 286), and “a societal relationship, an attribution of meaning and value to an object” (Dolff-Bonekämper, 2005, p. 70). Heritage tourism alone is defined by Richards (2001), as “the movement of persons to cultural attractions away from their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs” (p. 37). As such, heritage attractions may also be viewed as cultural attractions; however *products* of cultural heritage tourism typically involve objects such as museum artifacts, whereas *attractions* of cultural heritage tourism take the form of events such as festivals (Richards, 2001). To this end, cultural heritage tourism adheres to “that of society’s current culture that is located and underpinned by tangible evidence of the past” (Kaminski et al., 2013, p. 5).

Cultural heritage tourism is attractive to rural regions because of the uniqueness and differentiation associated with each ‘place’ (Timothy, 2014). According to Smith (2015), ‘place’ is a combination of “destination qualities, including landscape and architecture, history and heritage and social structures and relationships” (p. 221). Place-based cultural heritage tourism is founded on the assumptions that cultural experiences are embedded in the characteristics of the area (e.g. people, history, built heritage), and that a destination is produced and consumed based on the characteristics unique to that place (Jamal and Hill, 2004). Zasada et al (2015) suggest expenditures in “territorial capital and regional capacity building have been considered as the two main cornerstones of a place-based approach to rural development” (p. 178). They refer to territorial capital as “physical, human, and natural capital” (Zasada et al., 2015, p. 178).

Rural resources, or territorial capital, are mobilized by social capital, which in turn produces ‘countryside capital’ (Figueiredo et al., 2016). Countryside capital refers to efforts to preserve and protect the natural environment and rural quality of life, while, at the same time, promote economic development by capitalizing on rural assets (Garrod et al., 2006; McClinchey and Carmichael, 2010). Countryside capital takes two forms: tangible and intangible. Tangible countryside capital consists of natural resources (e.g. mountains, lakes), the built environment (e.g. historical buildings, museums), and cultural heritage products (e.g. festivals, handcrafted products) (Garrod et al., 2006; Mitchell and Coghill, 2000). Intangible elements of countryside capital are psychological, such as pleasurable experiences or the visual appeal of nostalgic landscapes (Mitchell and Coghill, 2000).

This rural tourism-related production and consumption is part of the ‘cultural economy’, “linked to tourist representations, flows of commodities and the consumption of special events” (Gibson and Connell, 2003, p. 165). The cultural economy, acknowledged as complex (Gibson and Kong, 2005), connotes that “space (and products) are becoming differentiated and imbued with symbolism” (Ray, 1998, p. 4). Thus, the rural cultural economy depicts cultural regions that become “engaged in self-promotion in order to preserve their cultural identity and develop their socio-economic vibrancy”, which “consists of strategies to transform local knowledge into resources available for local territory” (Kneafsey, 2001, p. 763). This involves the commodification of place-based resources, which manifest in a variety of cultural markers (Mitchell and Coghill, 2000; Mitchell and de Waal, 2009; Urry, 1990), including aesthetics, history, unique landscapes (Halewood and Hannam, 2001; Urry, 1990), local tradition, folklore, beliefs (MacDonald and Jolliffe, 2003), food, language and prehistoric sites (Kneafsey, 2001). Idealizing rural culture and landscapes furthers the commercialization of countryside capital (Tonts and Greive, 2002). In many cases, rural tourism captures these idyllic representations to satisfy consumers in search for authentic experiences. Woods (2011) argues that “the use of rural space for recreation and leisure is tied to an idea of in some way consuming rurality, or, at least, consuming attributes associated with an imagined rural idyll” (p. 92). The rural idyll is a common perception that natural resources, scenic landscapes and a slower paced lifestyle are attributes that are desirable to visitors, especially those seeking an authentic cultural heritage tourism experience (Mitchell and de Waal, 2009; Woods, 2007).

Many agree that cultural heritage tourism is an attractive developmental path for industrial regions experiencing economic decline (Hedfeldt and Lundmark, 2015; Mitchell and O’Neill, 2016a; Pawlikowska-Piechotka, 2009; Steel and Mitchell, 2017). This is no surprise, as some cite cultural heritage to be the fastest growing sector within the global tourism industry (Hargrove, 2017; Johnson and Rivas, 2013; Li et al., 2008; Timothy and Nyaupane, 2009). Substantiating this claim, Johnson and Rivas (2013, p. 10) identify this sector using Silberberg’s (1995) broad definition of cultural tourism: “visits by persons from outside the host community motivated wholly or partly by interest in historical, artistic or scientific or lifestyle/heritage offerings of a community, region, group or institution” (p. 361). In addition, changing consumption patterns favour authentic, value-added experiences (Bucurescu, 2015), encounters with different cultures and meeting new people (Petronela, 2016), and visits to heritage sites and

cultural attractions, especially as the world becomes more globalized and easily accessible (Secondi et al., 2011). In fact, the World Tourism Organization estimates that more than forty percent of global travel is culturally motivated (Richards, 2011), and this number is growing at approximately fifteen percent each year (Mckercher, 2002; Richards, 1996a).

This cultural heritage movement runs parallel to shifts from sectoral (space-based) to territorial (place-based) development approaches, where the focus now is to “strengthen endogenous local and regional economic potential to boost the competitiveness and the economic growth of rural territories” (Baumgartner et al., 2013b, p. 222). This shift inevitably requires the presence of entrepreneurs who can improve the economic performance of a region through innovation (Baumgartner et al., 2013b), the creation of jobs (Akgün et al., 2011), establishment of important urban-rural linkages (Mayer and Meili, 2016), and the injection of cultural (e.g. education, transfer of skills and knowledge) (Unger et al., 2009), financial (e.g. discretionary income) (Bosworth, 2009, 2012), and social capital (e.g. networking, relationship building) (Hedberg et al., 2011; Kalantaridis and Bika, 2011). Put together, rural in-migrant entrepreneurs have the “potential to bring external knowledge, ideas, and contact networks into a stagnating old industrial region” (Hedfeldt and Lundmark, 2015, p. 90). In the words of Canello (2016), “integration of the newcomers is expected to generate positive externalities in the host economic network, as local firms can exploit the advantages arising from accumulation of diverse know-how and from the connections built by foreign entrepreneurs in their home countries” (p. 1954).

Tourism attracts rural entrepreneurs motivated for lifestyle reasons (Eimermann, 2016). These entrepreneurs typically engage in commodifying the cultural heritage (Bredvold and Skålén, 2016) and natural amenities of a rural landscape (e.g. countryside capital) (Eimermann, 2016). Simply put, the commodification of place-based assets for rural tourism involves “identifiable characteristics of rural areas and the cultural meaning attached to rural areas” (Sharpley and Sharpley, 1997, p. 20). This practice has long been recognized as a way to promote anti-urban living, and romanticise the countryside as a “more natural, simple, slower, authentic and, thus, better state compared to the city” (Silva, 2013, p. 248).

Place-based assets in rural industrial regions are attractive to rural entrepreneurs (Halseth et al., 2010; Huggins and Clifton, 2011). Korsgaard et al (2015a) notes two forms of entrepreneurship in rural areas: “rural entrepreneurship” and “entrepreneurship in the rural” (p. 6). More specifically, entrepreneurship in the rural is motivated by mobility and profit, where a



firm is not dependent on place, rather space, meaning place-based assets are of little concern when choosing a rural location. In contrast, rural entrepreneurship embraces its relationship with rural places. Rural entrepreneurship is place-specific as a firm is built around assets that are tied to the place's tangible and/or intangible resources (Korsgaard et al., 2015a). For example, Mitchell's (2013) study explored the importance of place-based assets for heritage tourism, where firms capitalized on a place's assets to provide "intangible experiences that reflect the area's cultural roots" (p. 378).

On one hand, culture and heritage can enrich the tourism product and subsequently improve the quality of life for tourism destination hosts. Pavlič and Raguž (2013) suggest that "tourism with adequate management revitalizes cultural heritage and contributes to its efficient protection and preservation" (p. 163). What is more, cultural heritage tourism can instill pride in local groups (e.g. festivals, performing authentic cultural acts) (Cela et al., 2009; Silva and Leal, 2015), encourage preservation and protection of an area (e.g. restoration of historic monuments) (Gilbert, 2006), and provide economic benefits to rural populations (e.g. revenue for local businesses and community services, employment) (Phillips and Tubridy, 1994). On the other hand, the commodification of rural areas has the potential to undermine socio-economic disparities experienced by local populations. Rural tourism commodification is also known to promote a rural idyll "myth", offering false representations of culture and country life (e.g. staged performances) (Kordel, 2016, p. 207)<sup>7</sup>. Yet, rural tourism entrepreneurs are more likely to seek a lifestyle that values the local environment, as it is often a place where they also live (part-time or full-time) (Bosworth and Farrell, 2011). More often than not, their business is founded on:

...the basis of a more personalized supply and services that carry a genuine concern about place and community, integrating local people, resources and "distinctive features", aspects highly valued by target segments of small rural tourism business. They may, indeed, assume the function of "cultural brokers", facilitating the guests' understanding of and integration into local culture and community life (Cunha et al., 2016, p. 248).

This statement suggests that counterurbanite entrepreneurs in search of a rural lifestyle are more likely to incorporate local cultural and environmental values to create an authentic tourism

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<sup>7</sup> Tourism commodification is limited here as it is not the focus of this thesis. See MacLeod (2006), McKercher and Du Cros (2002), and Richards (1996a), for further reading.

experience. This is confirmed by Halseth et al (2010), who suggest ‘Quality of life and rural lifestyle have historically been important for holding businesses and residents in small-town places’, and “lifestyle assets in rural and small-town places are critical ingredients for attracting and retaining mobile capital” (p. 7).

Lifestyle tourism entrepreneurs are known to cluster in culturally dense areas (Saxena, 2016). Territorial agglomerations of businesses generate innovation, in that cluster firms can benefit from spillover information of “semipublic knowledge to complement their internal knowledge base and increase their own performance levels” (Tallman and Phene, 2017, p. 25). Increasing growth and competition in cultural heritage tourism over the past few decades has encouraged destinations to further differentiate their products and services (Richards and Wilson, 2007). Therefore, tourism destinations are starting to “supplement culture-led development strategies with creative development” (Richards and Wilson, 2007, p. 1), which is often influenced by creative types from urban areas (Florida, 2002), and typical of small tourism firms (Getz et al., 2004; Peters et al., 2009). It can be concluded that counterurbanites may be drawn to culturally-rich rural areas, where they may engage in innovative creative business activities.

Thulemark and Hauge (2014) argue that rural areas are appealing for the creative class because of the amenities, lifestyle, and slow-pace work environment. Moreover, “knowledge and creative industries” are driving the reconstruction of rural space (Lundmark et al., 2014, p. 424), as they possess “‘lifestyle amenities’ which the creative class really value and make frequent use of” (Bille, 2010, p. 466). Now, this is not to suggest that all rural in-migrants fit within Florida’s (2002) idea of the creative class. However, lifestyle migrant entrepreneurs are those who typically possess higher education, externally-accumulated cultural and social capital, and who add creativity, diversity, and innovation to a region (Carson et al., 2014).

An influx in talented and creative people can help stimulate rural economies through knowledge and innovation. This can mobilize cultural development and facilitate new paths, which diversify and strengthen the resilience of a rural region (Cruz, 2014). Lundmark et al (2014) suggest that “not only are in-comers seen as bringing innovation, creativity and entrepreneurship to rural areas, their entrepreneurial skills might also stimulate locals into entrepreneurship” (p. 426). This confirms that rural in-migrant tourism entrepreneurs can facilitate neo-endogenous development, and, play an important role in breaking the cycle of path dependence in locked-in industrial regions.

## **2.5 Conclusion**

The purpose of this chapter was to provide an overview of three major bodies of literature (rural change, counterurbanization, and cultural heritage tourism) to guide this research process. As mentioned in Chapter 1, these bodies of literature formulate the epistemological meta-theoretical framework that is used as a starting point to guide this research investigation. This is because evolutionary path dependence should be examined as an open system, and thus cannot exclude alternative knowledge (or non-knowledge from an ontological perspective) as possible causal explanations for research outcomes (MacKinnon et al., 2009; Martin and Sunley, 2006).

Consequently, the epistemological meta-theoretical framework that is used in this research covers a broad range of topics including: rural restructuring, path dependence, neo-endogenous development, rural in-migration/counterurbanization, lifestyle migration and migration motivations, rural entrepreneurship, and the relationship between the aforementioned. The following chapter discusses these topics in relation to the geographic region where this research occurs: Newfoundland. But first, Chapter 3 begins by providing a historical context of this place.

### 3 Newfoundland and Labrador

#### 3.1 Introduction

In 1949, Newfoundland joined Labrador to form Canada's 10<sup>th</sup> and final province (Riendeau, 2007). Covering approximately 405,720 square kilometres (Churchill et al., 2016), the province today has a population of 528,817 (as of July 1<sup>st</sup>, 2017) (Department of Finance, Government of Newfoundland and Labrador, 2017). The majority of its residents live along the coastline, reflecting an historical dependence on the saltwater cod fishery. The interior of the island of Newfoundland, in contrast, consists primarily of tundra and forests, and is relatively uninhabited (Summers, 2017). Until the 1990s, this population resided in a small number of inland towns that relied almost exclusively on pulp and paper production, or mineral extraction (Gmelch, 1983).

Newfoundland and Labrador's population density is the lowest among Canadian provinces<sup>8</sup> (Vodden, 2009). For many years, an aging population, combined with lowering birth rates, and rising rural out-migration (to employment-rich provinces such as Ontario and Alberta<sup>9</sup>), contributed to this low level (Vodden, 2009). In the past decade, however, the island has experienced in-migration and population increase, with most in-migrants choosing to move to, or near, the capital, St. John's, and along the Trans-Canada Highway (TCH) (Toohey, 2013). Hence, the majority of Newfoundland's population still resides in larger urban centres, leaving many rural areas grappling with declining populations, and few economic opportunities (Vodden, 2009).

The purpose of this chapter is to provide the reader with an overview of Newfoundland and Labrador's history, to explain how this current demographic, political, and economic situation has evolved. It begins with a discussion of the history of Newfoundland pre-Confederation, and then moves to an analysis of the island's Confederation with Canada, and the Smallwood era of industrialization and centralization. A brief history of the 1992 cod

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<sup>8</sup> While this research is interested in the island of Newfoundland, provincial statistics and references that include the mainland portion, Labrador, are sometimes necessary given that Newfoundland is only part of the province. The population density of Newfoundland and Labrador is 1.4 person/km<sup>2</sup> (Strengthening Rural Canada, n.d).

<sup>9</sup> Alberta-bound migrants have fluctuated, given recent economic circumstances, in Alberta; however, outmigration to Ontario remains consistent (Younglai, 2016).

moratorium is then provided, followed by a discussion of Newfoundland's new regional development approach, with an emphasis on alternative industries and cultural heritage tourism. Historical population and migration trends are then presented, along with a description of potential future economic development trajectories. These five general topics thus provide an overview of the province's evolution, and set the context for the present study.

### **3.2 Newfoundland: Pre-Confederation**

Long before European colonization, the Beothuk were the original inhabitants of Newfoundland (Holly, 2003). The first Europeans to set foot on Newfoundland soil were the Norsemen around the 10<sup>th</sup> century, followed by others, including the Portuguese, Spanish, French, and British, in later years (Bannister, 2003). The Beothuk were limited in number, with no more than 500-1000 people inhabiting the south and northeastern coasts of the island (Bannister, 2003). During the 16<sup>th</sup> century, sailors from parts of Europe, primarily England, Ireland and France, made annual voyages across international waters to the eastern shores of the Atlantic in pursuit of cod (Wynn, 2010). Before long, many sailors occupied the island of Newfoundland year-round (Wynn, 2010), exposing this indigenous population to conflict and disease. These events would eventually lead to extinction of the Beothuk people (Ullah, 2016).

British presence in Newfoundland can be traced to the arrival of a Genoese mariner, Giovanni Caboto, known as John Cabot, on June 24<sup>th</sup>, 1497, who claimed "St. John's Isle" as British territory (Government of Canada, 2017c). Records indicate that John Cabot led the voyage for the discovery of cod off the eastern Grand Banks of Newfoundland, where the intersection of warm waters from the Gulf Stream flowing north, and the Labrador stream running south provided ideal breeding grounds (Davis, 2014). Only in the 1600s, however, did the British form the first colony; now formally known as Cupids, Newfoundland and Labrador (Gilbert, 2015). This was followed by a period of seven years of warfare between the English and French, ending with the Treaty of Utrecht, giving Britain sovereignty over Newfoundland and its fishery. The Treaty of Paris was later signed in 1793, ending this ongoing rivalry, and confirming British control over this eastern territory (Sutherland, 2015).

Since the earliest British settlements in the 1600s, therefore, Newfoundland's historic growth and economic stronghold can be contributed to the cod fishery. Until roughly the 20<sup>th</sup> century, the inshore fishery was the backbone of the livelihoods of inhabitants in small fishing

village outports<sup>10</sup> (Wadel, 1973). Due to Arctic ice around the shore, though, cod fishing was primarily seasonal, and thus unsustainable as a year-round income source. As a result, many families were propelled to engage in alternative forms of subsistence production, such as forestry, agriculture, hunting, and living off the land (Wadel, 1973).

By the 18<sup>th</sup> century, roughly 30,000 English fishers sailed to the “new founde lande” for food to send back home (Wynn, 2010, p. 11). Nearly forty percent of these travelers returned to the island to fish each year; the remaining, including nearly 3,000 women, stayed on the island year-round (Wynn, 2010, p. 13). Towards the end of the 18<sup>th</sup> century, war and economic decline had significant implications for the industry. These disruptions halted the annual voyage of international fishers and resulted in growth of permanent settlements in Newfoundland (Wynn, 2010). By the 1940s, approximately 80,000 people were living on the island. Many were dispersed throughout the coves and bays and were almost entirely dependent on the fishing industry (Wynn, 2010). St. John’s was the political and commercial hub of the island (Dunn and Pantin, 2012), with salt cod as the primary export to the European and Caribbean markets (Wynn, 2010).

Traditionally, outport communities were governed by a merchant (Bellamy, 1976; Sweeny, 1997; Wareham, 1982) in a system some would call a “fishocracy” (Neis, 1981, p. 127). The fisherman-merchant relationship typically (but not in all cases) functioned on a credit basis. This arrangement, which Bellamy (1976) described as a “truck” system, was one where the “outport dweller lived in a semi-feudal economic relationship to the fish merchant who bought his catch” (p. 4). Merchants supplied fishermen with the necessities, such as fishing equipment and schooners, on credit. At the end of the season, fishermen would turn in their catch, whose value depended on its quality and quantity (Wadel, 1973). Fishermen were credited on a non-cash basis, with supplies and consumer goods provided for sustenance throughout the winter months. However, in poor seasons, fishermen would be in debt to the merchant, and rely on the following season to make up for their loss (Wadel, 1973). Thus, several years of poor fish-harvests could place fishermen “in a state of permanent indebtedness to the merchant” (Bellamy, 1976, p. 4).

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<sup>10</sup> An outport is “a Newfoundland colloquialism designation of all villages outside the capital port city of St. John’s” (Philbrook, 1966, p. 1).

As the number of merchants grew, they began to settle in St. John's; the largest port on the eastern coast of the island (Moore, 2012). Gradually, an increasing number pursued the trade of goods internationally. This global trade provided resources to merchants in smaller outports, placing the fisherman at a considerable disadvantage. Merchants acted as authority figures, possessing considerable knowledge of the outside world, and influencing matters of local government (Neis, 1981). In contrast, fishermen lacked global awareness, and the necessary skills to become self-sufficient or self-employed, forcing ongoing merchant reliance (Cohen, 1975). Thus merchants' commercial activities, and connections to the outside world, gave them considerable economic power over political figures and residents of the province's outport communities (Wadel, 1973).

Inevitably, the merchant-fisherman relationship began to erode. Outports became overcrowded, and subsistence living became increasingly difficult in congested communities. By the late 1700s, the "English migratory fishery virtually died out," as a result of the extended period of wartime between the English and the French (Hiller, 2016). Consequently, the offshore fishery grew, and lessened the need for large numbers of merchants in the fish trade (Hiller, 2016). Lack of government, and laws, also caused unrest in Newfoundland, as limited regulation of the fishery caused economic instability (Hiller, 2016). Strong international competition, coupled with an overabundance of codfish in the global market (causing prices to plummet), resulted in further collapse of the mercantile system (Higgins, 2008b). By the 1880s, the merchant-fisherman relationship began to reverse, with the former becoming indebted to the latter (Ommer, 1994). Un-returned credit forced the outmigration of outport residents, who could no longer afford to participate in the dissolving mercantile system. As the credit system collapsed, some merchants shifted their investment to non-local fisheries or other local resources (e.g. forestry), in the hope of diversifying the local economy (Ommer, 1994).

By the late 1880s, Newfoundland was in a state of economic crisis and crippling underdevelopment. As Ommer (1994) suggests, "the nation faced a commercial crisis because the old merchant system was becoming unworkable under conditions of modern capitalist competition" (p. 9). To diversify the economy, industrial development was initiated in the late 19<sup>th</sup> century, when a trans-island railway was constructed across the island (Ommer, 1994; Wadel, 1973). The railway opened Newfoundland's resource hinterland for exploitation, and the lumber industry soon "replace[d] the fishery as the major foundation of the Newfoundland

economy” (Wadel, 1973, p. 4). The establishment of two paper mills, in central and western Newfoundland, prompted population redistribution as residents relocated to inland settlements from outport bays (Hiller, 1982). Railway construction also facilitated the establishment of mining communities, inland (Higgins, 2007). However, in a concerted effort to stabilize an independent (from merchants) inland economy, the people of Newfoundland were forced to continue their reliance on foreign control. Mounting debt incurred to foreign investors to keep the railway in operation (White, 2012). As Ommer (1994) describes,

...the traditional merchant fishery was unable to support the costs of modernization, the growth of St John's and the huge costs of financing the railroad. In the event, the country's politicians and business people managed only to transform the economy, as David Alexander put it, from "a domestically-owned and controlled one-product export economy" to a "largely foreign-owned and controlled three-product economy" (p. 10).

The railway did, however, facilitate growth and development of the interior; yet, poor governance, along with economic hardships (e.g. Great Depression, foreign debt), led to the demise of this transportation network (Cuff, 2001). The passenger rail ceased to operate in 1969, and the commercial line closed in 1988. Roadways constructed after Confederation replaced the rail system as the main form of travel across the island (Pearson, 1989). In addition, “traditional” settlers were not industrial workers. For generations, they had lived off the land, and saw fishing and the sea as a way of life. Ommer (1994) sums the life of traditional Newfoundlanders quite nicely:

...fishers in Newfoundland were and, I would suggest some still are, non-industrial in culture, outlook and attitude. They are a people who have always worked their land and sea with family labour as far as possible, producing subsistence foodstuffs and necessities, such as their houses, as a highest priority (p. 11).

Thus, attempts to modernize the fishing economy and to industrialize the workforce, proved challenging.

Ultimately, Newfoundland was settled to meet British demand for natural resources. Thus, the island has a long history of being a subservient, non-industrial colony, governed by overseas rule (Wright, 2003). Consequently, by the 1800s, Newfoundland had failed to industrialize alongside Britain and much of the Western world (Ryan, 1994). This is because the British government was never intended to develop the economy so that it could support a large population of its own. Imperialism placed considerable control over Newfoundland, “by



withholding civic government and the rule of law because they wanted to monopolize the profits of the fishery” (Bannister, 2003, p. 21). Other measures to control population growth were to withhold the right to settle and own property (Bannister, 2003). Newfoundland’s severe underdevelopment, unstable political and economic conditions, and increasing population, therefore, required a new system of governance.

In 1826, Britain initiated implementation of “responsible government” in the colony (Library and Archives of Canada, 2005). A full-time governor and council were appointed in that year, followed by election of an assembly in 1833. Cognizant of the island’s poor economic performance, full responsible government was introduced in 1855. From the mid-1800s to Confederation, Newfoundland debated union with Canada (Library and Archives of Canada, 2005). Though much discussion was generated between Canada and the colony, Newfoundland ultimately chose to pursue full independence from Britain; successfully implementing self-governance as the Dominion of Newfoundland in 1907 (Hiller, 2007). However, increasing debt from the First World War and the Great Depression, prompted Britain to relinquish the island’s self-governing system (House, 2001) and to replace it with the Commission of Government; a non-elected governing body appointed by the British government (Webb, 2008). The Commission of Government remained in power for the next fifteen years, until Newfoundland’s eventual union with Canada (Webb, 2008).

### **3.3 Newfoundland: Post-Confederation**

The province’s first Premier, Joseph Smallwood, was influential in Newfoundland’s decision to join Canada (Gmelch and Richling, 1988). Smallwood, a native-born Newfoundlander, was a public figure involved in reporting and writing for several newspapers. Some jobs required him to travel to Europe and other parts of North America, where he gained political insight; finally settling back in Newfoundland and entering into politics in 1928 (Library and Archives of Canada, 2005). Smallwood used his broadcasting abilities to advocate for the island’s union with Canada (Baker, 2003). In 1947, Smallwood was announced as the Confederation nominee; two years later, he was leading the island into its union with Canada (Baker, 2003).

Smallwood, also known as “the Father of Confederation” (Library and Archives of Canada, 2005), recognized the need to industrialize the province’s economy. Confederation with

Canada led to an influx of monies from federal reserves (Baker, 2003). As such, Smallwood needed to decide where to allocate national funding: services or industry. The former would alleviate immediate disparity; however, as the island's history had proven, short-term relief had rarely led to long-term solutions (Wright, 2003). Ultimately, Smallwood "turned to industrialization as the means to the new province's economic salvation, first through small-scale manufacturing ventures and then, when most of those failed, through large resource-based and manufacturing projects" (House, 2001, p. 13). Smallwood also sought to restructure rural Newfoundland by relocating people from outports to economic "growth centres" (Finch, 2009, p. 154). However, resettlement (Martin, 2006b) and centralization (Martin, 2006a) programs had social and economic consequences, such as difficulties adapting to living and working in urban environments, and resentment among community members who departed and remained. Furthermore, industry was not always reliable, jobs were low-waged, and centralized populations became even more dependent on state programs than before; an outcome that Smallwood had not predicted (Wright, 2003).

A historical turning point, that would "shape decades of Newfoundland public policy in rural areas", was the introduction of the Federal Government Employment Insurance (EI) Program (Vickers, 2010, p. 24). The introduction of E.I provided an alternative to resettlement for many outport residents. Vickers (2010) suggests that E.I "created an extreme dependency on social programs, and it shaped the way rural economies are developed" (p. 24). Moreover,

...rural residents would eventually believe that it is their right to live and work in the community where they were born. This idea was only reinforced by politicians who promised to fight for their constituents and to never let any communities die. The atmosphere into which this institution was introduced created a path dependence where the program was shaped and used as an income supplement rather than an income insurance program (Vickers, 2010, p. 24).

In addition to E.I, Blake (2003) suggests that "a number of communities in rural Newfoundland became disillusioned with the government's approach, citizen's organized at the grass roots level to find solutions to their own economic problems" (p. 205). Resistance to resettlement programs of the 1950s and 1960s, led to the formation of Regional Development Associations (RDAs), which were founded by local communities, with local government taking responsibility for infrastructure (Vodden et al., 2014). Some suggest that the establishment of RDAs represent the beginning of "a system of local governance that would form the foundation

of “bottom-up” development in the province” (Vodden et al., 2014, p. 4; see also Greenwood, 1991). In addition, the introduction of Memorial University’s Extension Service further supported rural development over rural resettlement. The Extension Service program:

...provided support to the movement through leadership training, organizing conferences of local developers and outside experts, and through an innovative use of film with local people to get them talking and sharing experiences and ideas about how to turn things around in their local economies (House, 2001, p. 14).

Industrial decline occurred years after the Smallwood era (1949-1972). The mining industry faced hardships during the 1970s and 1980s, as the majority (77.0-99.0%) were privately owned by eight corporations (Wardle, 2004, p. 11). The decline in the pulp and paper industry was a result of global recession, and increasing online readership (Higgins, 2011). Added pressure from the growing number of fishing vessels, and improved technology, caused a near extinction of salt water fish. Simultaneously, many remaining small-scale fishermen were forced out of work; inevitably wreaking further havoc on the island’s economy and adding greater pressure on E.I programs (McGuire, 1997).

After Confederation with Canada, the province of Newfoundland experienced an extensive period of exogenous development. Industrialization intended to invigorate the island’s economy to compete with the rest of the nation. This included infrastructure development, and resettlement programs, that shifted populations from remote rural regions towards larger urban centres. However, as indicated by Hall et al (2017), this approach led to “inadequate support for relocation as well as poor integration into new communities and limited economic opportunities” (p. 53). Unfortunately, worsening economic conditions were still to come.

### **3.4 Collapse of the Cod Fishery**

The exploitation of natural resources, particularly the fishery, increased following Newfoundland’s union with Canada. Further development of the fishing industry was marked by: a) the expansion of fishing territories into northern Newfoundland and parts of Labrador; b) increased off-shore fishing; and c) intensification of fishing efforts and modernizing technology (Hutchings and Myers, 1994). These trends continued to reduce cod stocks (Milich, 1999). Mismanagement also contributed to this decline, which would become apparent over time. In addition, migratory patterns and breeding habits made it increasingly difficult to manage sustainable catch with competing nations (Milich, 1999). Thus, the Northwest Atlantic Fisheries

Organization (NAFO) was founded to oversee the fisheries inside a 200-mile radius extending from the province's coast. Although NAFO deserved recognition for their local success, they had minimal authority over fishery management outside the 200-mile zone (Sullivan, 1989).

July 2, 1992, is, undoubtedly, one of the worst days in Newfoundland's history. John Crosbie, the Canadian Minister of Fisheries and Oceans, and Newfoundland resident, placed a moratorium on commercial fishing of northern cod (Schrack and Roy, 2013). The impact was devastating, as Newfoundland's cod industry was "historically one of the great fisheries of the world" (Schrack and Roy, 2013, p. 397). Although the industry had been declining for a number of years, the sudden ban left over 9,000 fishers and 10,000 plant workers jobless overnight. Furthermore, many additional spin-off industries could no longer survive without the fishery (Milich, 1999). The total number of registered fishers was 24,915 pre-moratorium. A 2014 report by Woodrow et al (2014) indicated that of these fish harvesters, 11,075 were employed full-time. Furthermore, it is estimated that approximately 30,000 people lost their jobs immediately upon closure (Woodrow et al., 2014).

In the late 1990s, unemployment rates sat around 17.0 percent; double the rest of Canada (Milich, 1999). Job shortages induced out-migration to the mainland, primarily to Alberta and British Columbia whose economies were booming (Milich, 1999). However, Richling (1985) suggests that "migration has figured prominently in Newfoundland's social and economic life" (p. 236). Furthermore, migration was common, if not to the mainland or international destinations, to urban areas of the island (Higgins, 2008b). However, out-migration "intensified during the 1990s after the collapse of the cod fishery deprived most small villages of their economic base" (Higgins, 2008b). Over the fifteen-year period from 1992 to 2007, the province's population dropped more than twelve percent, from its highest recorded level of 580,109, to a low of 509,039 people (Moazzami, 2014).

The cod moratorium was slated to last for at least two years. However, the ban was extended indefinitely in 1994 (Schrack, 2005). This event marked the beginning of a long road of rural restructuring in the province. Part of this resulted in the expansion of shellfish harvesting, as it was found to be more lucrative than cod. For example, in 1990, cod catches accounted for approximately \$134 million, compared to the value of the entire fishing industry (flatfishes, Greenland halibut, capelin, lobster, and cab) at \$277 million (Schrack, 2005, p. 410). Only three years later, in 1995, cod value had "shrunk to practically nothing, the landings of

shrimp had nearly quadrupled and those of snow crab had tripled...total landings were worth \$321M in nominal terms, more than ever in the past” (Schrank, 2005, p. 410). Power (2017) suggests this outcome is associated with the province’s “major restructuring of its fishing industry, an important source of employment, resulting in a reduced workforce in both the harvesting and processing sectors, and increased privatization of the resource” (p. 449).

A reduced workforce necessitated more relief programs from provincial and federal governments. These programs came in the form of the Northern Cod Adjustment and Recovery Program (NCARP) (Schrank, 2005), and The Atlantic Groundfish Strategy (TAGS) in 1994. Federal funding from the NCARP (1992-1994) and TAGS (1994-1998) generated \$903 million, and \$1.9 billion, respectively, allocated to economic development, and the growing number of laid-off fishermen and plant workers<sup>11</sup> (Cox, 2006, p. 289).

While immediate relief was available, governments recognized the need for new strategies for rural development. Until the 1990s, Newfoundland was predominantly governed by exogenous models of rural growth, with the exception of endogenous-based efforts to counter resettlement (i.e. RDAs). In light of the current economic crisis, there was increasing “recognition of the importance of social and human capital to development” (Krawchenko, 2016, p. 9). Thus, like elsewhere, Newfoundland shifted towards a more inclusive approach to endogenous forms of rural development.

### **3.5 Regional Economic Development**

Some describe the collapse of the cod fishery as “an ecological disaster and the death of rural way of life that had endured for centuries” (Davis, 2014, p. 695). The moratorium was especially difficult, because “Newfoundland had failed to pursue forms of development that could have strengthened its local economies” (DeWeese-Boyd, 2007, p. 139). Douglas and O’Keeffe (2009) describe this as a time where:

...aspirations for more economic independence and self-reliance, for more secure livelihood opportunities, for diversification and some release from an essentially colonial, staples-based economy, and for greater control in the province’s social, cultural, economic, and political development, permeated most chapters of this colourful and at times tumultuous story (p. 79-80).

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<sup>11</sup> The number people who lost their jobs two years after the moratorium reached nearly 40,000 (Davis and Komeski, 2012).

Some suggest that the political shift to neoliberalism in the 1980s further exacerbated the economic crisis (Overton, 2007). Like elsewhere, neoliberal policies in Newfoundland:

...aimed to make individuals and communities more responsible for providing for themselves. The call was for self-reliance and self-help as a new localism in social and economic development policy was encouraged. The promotion of a “community” approach to social and economic development policy was part of an attempt to shift responsibility for dealing with the crisis away from the federal and provincial governments (Overton, 2007, p. 60).

Consequently, in the years leading up to, and after, the northern cod ban, joint federal-provincial government funding was distributed to a number of development projects to mobilize grassroots development. To accomplish this, the Economic Recovery Commission (ERC), under Premier Clyde Wells, drafted the 1992 *Change and Continuity: A Strategic Economic Plan for Newfoundland and Labrador* (Blake, 2003). The report outlined a plan that was “consistent with the new-economy, economic diversification thrusts of the Economic Recovery Commission” (House, 2001, p. 18-19). However, over the next several years, the plan failed to materialize (House, 2001).

In 1994, in recognition of “fiscal constraints”, “too many agencies involved in regional development with too much funding and little accountability” (House, 2001, p. 19), and the need to “help the province adjust to federal spending cuts to social programs” (Close et al., 2007, p. 5), a joint federal-provincial Task Force on Community Economic Development (CED) was formed. The CED model placed emphasis on place-based development, and took a community-based partnership approach, where the private sector ought to be the “main engine of economic development, with government playing a supportive and facilitative role (Blake, 2003, p. 206). The federal side was represented by the Atlantic Canada Opportunities Agency (ACOA), which had formed under the restructuring of the Canadian Regional Development Associations (creating 5 development associations to advocate for select regions of Canada) (Hall et al., 2017). The ERC was represented by the provincial government, and gave a voice to various labour, enterprise, and community-based groups (House, 2001).

Together, the joint federal-provincial initiative developed: *Community Matters: The New Regional Development* report (Hall et al., 2017). The report called for the establishment of 20 Regional Economic Development Boards (REDBs), which were introduced between 1996 and 1999 (Douglas and O’Keeffe, 2009). The formation of REDBs reflected the same principles as

the then popular CED approach. However, the landscape of Newfoundland is “characterized by hundreds of small coastal communities scattered along thousands of miles of coastline”, and not conducive to a CED approach, as “communities are too small” to develop differently from one another (House, 2001, p. 20). REDBs were constructed as an endogenous approach to further secure partnerships with regional, provincial, and national governments (Hall et al., 2017). Representation was given to various levels, including “business, communities, education, labour and existing development organizations” (Hall et al., 2017, p. 55). The *Community Matters* (Task Force, 1995, cf. Hall et al., 2017) report assigned each board with five key agendas in their region:

- establishing and employing a Strategic Economic Plan,
- organizing enterprise development and assistance,
- navigating and supporting community-based groups and organizations through the Strategic Economic Development Plan with specific development initiatives,
- encouraging and facilitating social and economic goals specific to their region, and,
- fostering regional economic development growth through community learning and public participation.

Until the turn of the 21<sup>st</sup> century, rural development was heavily focused on economic initiatives. However, the new political landscape, which arose from the incoming liberal government, brought about a ““community turn” in economic development and prioritized the bottom-up involvement of community actors, empowering them to be part of the policy process” through the Strategic Social Plan (SSP) (Krawchenko, 2016, p. 10). This evolved out of the growing social problems post-moratorium (e.g. out-migration, declining funds for infrastructure and services) (Close, 2007). In 1998, a final plan was released: *People, Partners and Prosperity: A Strategic Social Plan for Newfoundland and Labrador* (Rowe and Randell, 1999) that established a Social Policy Advisory Committee to address issues such as “health care, education, justice, municipal services, housing and social services,” through public consultation (Government of Newfoundland and Labrador, 1996). However, some argue that the SSP had greater ambitions of mobilizing civil society (Close, 2007) through “empowering the volunteer

and community sector” (Krawchenko, 2016, p. 9) to “pursue place-based solutions that encouraged collaborative governance” (Close, 2007, p. 1).

Many scholars have analysed the province’s regional approach to rural development<sup>12</sup>. It is widely acknowledged that this approach represents a shift from exogenous to endogenous forms of rural development. This is described as an evolution from a time of resource dependence, population out-migration, and financial crisis, to the rise in civic sector, and community-based, place-based, initiatives. However, it is not the goal to explore this evolution in its entirety, as it exceeds the scope of this research. Rather, the remainder of this chapter focuses on the development of Newfoundland’s cultural heritage tourism industry, and, the pursuit of “neo”-endogenous rural development goals.

### **3.6 Cultural Heritage Tourism**

Tourism in Newfoundland existed long before the moratorium. Seymour (1980) suggests that Newfoundland has made “vigorous attempts to promote tourism in the province since the 1880s as a result of the fishing crisis of the late nineteenth century” (p. 34). Newfoundland initially appealed to outdoor adventurers, and recreational hunters and fishers (Seymour, 1980), attracted by the province’s wilderness and rugged landscape (Wyle, 2008). The construction of the passenger railroad in the 1880s enabled domestic travel. However, at this time, international travel to the province was minimal, as limited infrastructure restricted the island’s accessibility (Brake and Addo, 2014).

After Confederation, the Smallwood government set aside provincial funding to improve both air and boat access. At the same time, the founding of several Provincial and National Parks created a demand for cultural heritage seekers (Brake and Addo, 2014), who were “enticed to visit and experience the unique culture, history and environment...like historic sites, museums and National Parks, as well as activities like seas kayaking and hiking, or whale, puffin and iceberg viewing” (Ramos et al., 2016, p. 210). Newfoundland was thus using its natural resources to lure tourists seeking to escape the “polluted and crowded” cities of the industrial world (Seymour, 1980, p. 35).

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<sup>12</sup> See: Baldacchino, 2015; Baum, 1999; Baum and Hagen, 1999; Carter et al., 2001; Everett, 2007, 2009; Fife, 2004a; Fife, 2004b; Foley et al., 2015; Gibson, 2013; Hall et al., 2017; House, 2001; Jolliffe and Fansworth, 2003; Krawchenko, 2014, 2016; Mitchell and Shannon, 2017; Overton, 2007; Rockett and Ramsey, 2017; Stewart and Maffei, 2011; Stoddart and Soder, 2015; Sullivan and Mitchell, 2012).



In 1979, Newfoundland accepted \$13.2 million from the National Development of Regional Economic Expansion for tourism. In the agreement, six key strategies were identified: planning and coordination, marketing, attractions, packaged-tour development, tourist services, and accommodations (Seymour, 1980). This federal injection of financial capital, largely contributed to further development of cultural heritage tourism. The restoration of historical landmarks, and the communication of cultural assets, was a strategy used to draw tourists to more remote and rural parts of the island (Cilento, 2017; Miles, 2017). Marketing of Newfoundland's unique natural resources (e.g. coastline, whales), was a tactic to attract amenity-seeking travellers. It was anticipated that funds invested in small industries, such as rural tourism, could diversify rural economies and ease dependence on the fishery (Seymour, 1980).

After the closure of the fishery, government's goal of diversification quickly shifted from moderate to aggressive tourism development. Some suggest that governments were "grasping the tourism straw" (Overton, 2007, p. 63), while other rural Newfoundland youth described tourism as "a last resort" (Hood et al., 2005, p. 2). Critics also argued that tourism wages are low-paying, and jobs are often seasonal (Ommer, 2007). Nonetheless, neoliberal policy in Canada in the 1990s was that of "promoting Canada's distinctive cultural forms for tourism"; Newfoundland agreed, declaring rural areas a "definite comparative advantage" in the market of "cultural tourism" (Doody, 1999, p. 15, cf. Department of Tourism, Culture and Recreation, 1994, p. 10).

Bill (2009) suggests that "outport life and folk culture were threatened by Smallwood's industrial policy" (p. 94), in that culture was "undermined by industrialization, the welfare state, urbanization, and the introduction of North American values in the period since the Second World War" (Overton, 1996, p. 9). What is more, the economic conditions of the late 1990s further jeopardized outport culture and identity. With this in mind, tourism offered outports a chance at revival, as it drew visitors into outlying areas and funneled significant amounts of money into cultural and artistic institutions (Bill, 2009). In addition, tourism provoked the "emergence of Newfoundland writers, visual artists, performing artists and film makers", and provided a springboard for numerous festivals (Bill, 2009, p. 96) and "Come Home Year"<sup>13</sup> events that are attractions of Newfoundland expression (Rompkey, 1998, p. 271).

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<sup>13</sup> Come-Home-Year festivals first began in 1966 to encourage ex-Newfoundlanders to return home. It is suggested that they provided "a model for festivals in the years to come" (Rompkey, 1998, p. 271).

The outport community, and its physical setting, were viewed as providing a tourism advantage. It was believed that the traditional, authentic way of life, associated with outport living, would be valued by those looking to experience rural nostalgia (Baehre, 2015). Woods (2015) indicates that this focus required the “recoding of the outports and their components” (p. 37). He describes that “landscapes that were once perceived as hostile and threatening are now coded as unspoilt and exciting, and icebergs that were once risks to shipping are now natural wonders” (Woods, 2015, p. 37). Culturally romantic, the “real Newfoundland” was promoted as the “outports and “the people”, the fishermen knitting their nets, caulking their boats, or building a wiggly garden rod fence” (Overton, 1980, p. 119). Palmer et al (2008) add that while “images of nature have dominated the attempts to attract tourists, human attractors have long been present” (p. 220). They draw on examples from Overton (1996), who identifies brochures from the early 1990s displaying outport folk playing the accordion, and how such images have been construed to represent “the unique Newfoundland outport culture” (Palmer et al., 2008, p. 220). While the exact nature of Newfoundland cultural heritage tourism has been disputed (e.g. Baum, 1999; Overton, 1980), a 2016 non-resident tourist exit survey reveal that one of the top three satisfactions of visitors’ trips to Newfoundland and Labrador is “meeting local people who help create memorable moments”, and that “experiencing local cuisine and exploring small/rural communities are the most popular cultural/heritage experiences” (Department of Tourism, Culture, Industry and Innovation, 2018, p. 14-15).

However, an “emotional affiliation” with Newfoundland existed long before aggressive tourism marketing campaigns (Lerena, 2015, p. 24). According to Lerena (2015), many factors, such as the departure from nationalism in 1949, unprecedented outport out-migration and resettlement in the 1950s and 1960s, unsuccessful attempts to modernize and industrialize under the Smallwood administration, and the historic collapse of the ground-fisheries in the 1990s, fuelled the province’s tourism industry and created a “naïve romanticism” that has “made them flourish economically”<sup>14</sup> (p. 24). For example, this long-standing “emotional affiliation” is present in government material to promote tourism,

Our people and our place, together, breed a culture so thick that it engulfs us  
and our travellers. Our natural and cultured character combined with a long  
history of strength and bravery plus a formidable creative streak make

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<sup>14</sup> Lerena (2015) identifies oil extraction as another key factor contributing to the island’s economic success.

Newfoundland and Labrador a traveller's paradise (Uncommon Potential, 2009, p. 5).

Also, the dissimilarities of Newfoundland, from the rest of Canada (e.g. peripheral island location, distinct dialect), as well as their anti-globalism image, provide a unique setting for outsiders who seek a slower-paced lifestyle, seemingly cut-off from rest of the world (Lerena, 2015); a world where one can meet “strangers who quickly become friends” (Uncommon Potential, 2009, p. 5).

The commodification of Newfoundland's natural amenities, and cultural identity, has proven to be socially and economically advantageous. For example, the Government of Newfoundland and Labrador purports “romanticism not only preserves an “authentic” Newfoundland identity but actually saves the island through a tourism industry that invites non-Newfoundlanders to experience this place's significant history, distinct culture, and genuine people” (cf. Chafe, p. 2008, p. 171). As such, a goal of the province's 1992 Strategic Economic Plan was to “promote the use of the province's cultural resources for economic benefit” (Carter et al., 2001, p. 113). This part is referred to as *A Vision for Tourism in Newfoundland and Labrador in the 21<sup>st</sup> Century* (1994). Developers of the tourism strategy argued that “investment in tourism was justified at the expense of social programs due to the industry's unparalleled ability to generate economic benefits and develop a framework for preserving and creating tourism product” (Sharratt, 2017, p. 29).

As a result of this development platform, “Heritage and culture have become the centrepiece of the tourism product offered by the province” (Carter et al., p. 2001, p. 113), with “place-based tourism” initiatives emerging across the island (Rural Resilience, 2018). For example, Sullivan and Mitchell's (2012) study of Ferryland, an outport along the southern shore of Newfoundland, found that their “historic place-based assets are a key motivation luring visitors to this locality” (p. 44). Furthermore, place-based initiatives are being created by various stakeholders, who include civic sector and community groups. As indicated by Sullivan and Mitchell (2012), the “adoption of neo-liberal policy in Newfoundland, as elsewhere, has forced civic groups and private entrepreneurs to assume greater control over the industry” (p. 39). Close et al (2007) purport that “equally novel was the fact that these new actors were to pursue place-based solutions that encouraged collaborative governance” (p. 1).

The non-profit sector and community-based groups are fundamental to the growth of the tourism industry, and account for most anchor events and attractions in Newfoundland. According to the Newfoundland and Labrador Ministry of Tourism, Culture, Business and Innovation (n.d.), anchor attractions are entities such as UNESCO World Heritage Sites, which are “operated primarily by federal and provincial government departments and agencies, municipalities, non-profit tourism, arts and heritage organizations” (p. 19). Furthermore, non-profit tourism attractions are the “foundation of what drives visitor demand” and are heavily dependent on volunteer labour (Department of Tourism, Culture, Business and Innovation, n.d., p. 19).

For example, in Newfoundland, historic sites attract hundreds of thousands of people per year. Registered World Heritage Sites, such as L’Anse aux Meadows and Gros Morne National Park, draw 174,000 and 30,000 people, respectively, every twelve months (Rockett and Ramsey, 2017, p. 304). In addition, the province of Newfoundland and Labrador is home to eight National Historic Sites (7 located in Newfoundland) and thirteen Provincial Historic Sites (12 located in Newfoundland) (Newfoundland and Labrador Tourism, 2017c). Historic sites and cultural markers also influence tourism routes and road signage. For example, Palmer et al (2008) point out that “attention given to this archaeological find in the 1970s and 1980s led to Route 430 (the main road on the GNP<sup>15</sup> that runs along the west coast from Deer Lake to St. Anthony) being named the Viking Trail” (p. 221). Other references to culture and heritage include tourist routes, such as the “Irish Loop” and “Baccalieu Trail”, whereas “place names refer to aspects of physical geography”, such as “Cape Shore” (Palmer et al., 2008, p. 221). The “Irish Loop”, located along the southern shore of the Avalon Peninsula, is a perfect example of cultural commodification of place-based assets (e.g. Sullivan and Mitchell, 2012). This part of the island was a popular landing for 16<sup>th</sup> century Irish immigrants (Keough, 2008). Today, the southern shore “prides itself on being the most Irish corner of the island of Newfoundland”, where businesses and tourism associations glorify the shamrock in tourism material as if it were a native moniker to the island (Keough, 2008, p. 12).

Nonetheless, place-based tourism marketing has contributed to Newfoundland’s tourism industry success. In 2006, the provincial government “invested millions of dollars on an

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<sup>15</sup> GNP is the abbreviation of Great Northern Peninsula (Palmer et al., 2008).

aggressive multimedia advertising campaign to encourage visitors from around the world to ‘Find Yourself Here’” (Rockett and Ramsey, 2017, p. 301). This campaign has earned over 285 awards (Department of Tourism, Culture, Industry and Innovation, 2017d), and appears to have had an impact on increasing tourism expenditures and non-resident visitation. For example, at the time of the cod moratorium (1992), non-resident tourist numbers were approximately 264,000<sup>16</sup>. This number nearly doubled only a decade and a half later. In 2007, approximately 490,100 foreign-born travellers landed in Newfoundland and Labrador. In the same year, revenues generated from visitors were an estimated \$357 million (Department of Tourism, Culture, Industry and Innovation, 2017g).

The early success of this advertising campaign inspired the government to develop tourism further. This resulted in the 2009 strategic report: *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism*. The tourism document is a long-term plan to navigate the partnership of government, industry, and various stakeholders, towards a successful tourism sector by 2020. The overarching goal of the plan is to double tourism revenues by the end of this decade (2020) (Uncommon Potential, 2009). The plan emphasizes marketing campaigns as a key strategy to boost tourism numbers. For example, in 2016, the Department of Business, Tourism, Culture and Rural Development (2016) claimed that:

Newfoundland and Labrador tourism’s advertising campaign is one of the most recognizable successful advertising campaigns in the country....our new campaign will increase non-resident visitation, resulting in new revenues and economic growth throughout the province.

Promoting the province in slogans, such as “a place where you can, at the same time, lose yourself and find yourself”, are designed to “evoke an emotional connection” (Uncommon Potential, 2009) and “childlike curiosity...that all too often we forget about as adults” (Paul, 2012). Furthermore, Kelly (2013) argues:

...advertisements consistently present idealized versions of a pristine, powerful, and compelling landscape, inhabited but unharmed, and scenes of everyday and night life that evoke comfort, camaraderie, and security, outside modernity. As someone with an affinity to these images and for whom they bear at least some resemblance to (or a reassembly of) a cultural life once had, once lived, these texts stir a powerful emotional turn to a “once (upon a) time” (p. 54).

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<sup>16</sup> Tourist numbers represent non-residential visitors to Newfoundland and Labrador. Unfortunately, visitor numbers for the island of Newfoundland are not available.

As a result of strategic marketing, the province witnessed a record number of visitors in 2010 of 518, 500. Although this number stabilized over the next five years (503,014 as of 2015<sup>17</sup>), annual tourism expenditures have continued to rise; the year 2015<sup>18</sup> generating a record number of (\$492.8 million) tourism expenditures from non-resident visitors (Department of Tourism, Culture, Industry and Innovation, 2017g). In 2013, a CBC news article reported that the “province’s tourism industry recently broke the \$1billion-a-year threshold” in revenues (Antle, 2013). This is, in part, a result of domestic travel in the province, which accounts for fifty-eight percent of all tourist expenditures. According to the latest statistics provided by the provincial government in 2010, tourism activity directly contributed to \$288 million in GDP or 1.1 percent of the economy. In contrast, in the same year, logging and fish harvesting accounted for 0.3 and 0.6 percent of the GDP, respectively (Department of Tourism, Culture, Industry and Innovation, 2017f).

Rural development policies, however, have shifted over the years. Significant investment in the 1990s has left communities feeling vulnerable today, due to recent provincial and federal cutbacks (e.g. ACOA). This is because many communities, that were original recipients of government-funded development projects, are now confronted with the goal of being self-sustaining (Overton, 2007). For instance, in 2001, the Viking Trail Tourism Association raised concerns about the long-term sustainability of civic sector tourism attractions. Some of these include Provincial Historic Sites, community-run museums, various archaeology sites, and community theatres (Overton, 2007). Nearly a decade later, community stakeholders have similar complaints: “without ACOA as a committed partner in community development projects, it would be virtually impossible to attract funding from other partners” (Atlantic Canada Opportunities Agency, 2009, p. 3, cf. Krawchenko, 2016, p. 8). This is because “government agencies such as ACOA provide key resources to the sector”, therefore, “the ways that they structure programs shapes the agenda of groups at the local level” (Krawchenko, 2016, p. 8).

This has not gone unnoticed by governments, as Overton (2007) explains, pointing to growing concerns from the Department of Tourism, Culture and Recreation about the fate of non-profit organizations. Diminishing subsidies has forced stakeholders on all fronts (i.e. civic, public, private) to reconfigure the future of tourism. At the same time, the SSP was abandoned

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<sup>17</sup> The 2016 number of non-resident visitors to the province is not yet available.

<sup>18</sup> 2016 non-resident tourism expenditures are not yet available.

and replaced with the Rural Secretariat (RS). This had serious implications for REDBs, as the RS “was more of an advisory approach where the government appointed members who brought out regional concerns to the province or review” (Simms and Greenwood, 2015). This has compromised endogenously-focused REDBs, since what is “unique about this approach is that members were locally selected by constituent stakeholders: municipalities, business, organized labour, education and training and institutions and community development organisations among others” (Simms and Greenwood, 2015, p. 19). For the past three decades, rural Newfoundland reorganized under various “delivery mechanisms”, and “existing organizations were not always formally eliminated as new governments established new structures with new regional boundaries and different but overlapping mandates” (Freshwater et al., 2011, p. 10). The outcome has been “a confusing set of regional administrative structures that have conflicting and competing mandates and weak authority” (Freshwater et al., 2011, p. 10). Their inadequacy has been compounded by limiting government funding. For example, a study conducted from 2012-2014 by Krawchenko (2016), finds,

Community economic development projects now require robust business models, clear evidence of long-term sustainability, and heightened reporting requirements. Government funding bodies want to see that the projects they fund are robust and successful. However, something may be lost in the process. Several interviewees noted that the priorities of governmental funders did not match up with the community priorities and that the governments involved (provincial and federal) focus disproportionately on business development over social and cultural development objectives (p. 9).

To counteract declining funds from provincial-federal governments, new forms of capital (e.g. cultural, financial) are required. Greater emphasis on community development also appears to be needed.

As discussed earlier, similar tourism regions have proven successful at achieving neo-endogenous goals with the help of rural in-migrant externally-accumulated capital and extra-local resources (e.g. Carson and Carson, 2014; Mitchell and O’Neill, 2016a; Steel and Mitchell, 2017). Some in-migrants contribute to neo-endogenous development by opening a rural firm after they have relocated to the countryside (Bosworth, 2010). Within the last decade, many areas of rural Newfoundland have experienced a surge of foreign buyers purchasing cheap outport properties. For example, a report in the CBC News suggests “vacationing Britons [are] buying quaint cottages on the coast of Newfoundland”; making rural outports increasingly

foreign owned (Stastna, 2012). Another CBC News article enlightens readers on the “Selling of rural Newfoundland”. The author, Emily Urquhart, writes:

Two weeks ago, a handmade ‘for sale’ sign went up on a house here in the Cove. The price tag was \$15,000. My visiting parents and in-laws from Ontario excitedly ran down the hill to check it out...many buildings are advertised through realtors based in St. John’s, like this house in Bonavista that recently sold for about \$30,000 (Urquhart, 2010).

A picture of this house is presented below (Figure 3.1), followed by another abandoned saltbox house for sale (Figure 3.2).



**Figure 3.1** Photo of a Saltbox House for Sale in Outport Newfoundland

Source: Urquhart (2010)





**Figure 3.2** Photo of Abandoned Outport Saltbox House for Sale to Prospective Buyer

Source: Urquhart ( 2010)

The above photo, taken in rural Newfoundland, depicts just one of many old abandoned buildings that newcomers from mainland Canada, the United States, and Europe, particularly, are eager to purchase, renovate, and use as seasonal homes (Urquhart, 2010). Other articles have also written about the increase of foreign interest in rural Newfoundland. The Economist reported a traveler's diary that read: "Before leaving, I decide to have lunch at the resort's café down by the lake. Around me I hear British, German and American accents. Foreigners have taken to the place in a way that Canadians have not. There will undoubtedly be more" (The Economist, 2007). The Wall Street Journal also wrote that Americans were purchasing saltbox homes for "the price of a used SUV" (Belkin, 2007). This is not surprising, given that houses were reportedly selling for "as little as \$1,000" in 1996, just four years after the cod moratorium (Wall Street Journal, 1998). Given the context above, outport Newfoundland has the potential to attract many more rural in-migrants. What is more, prospective in-migrants may choose to open a business post-rural move, and, thus, warrants further investigation.

### **3.7 Conclusion**

In brief, Newfoundland has a social and economic history unlike the rest of Canada. The economic circumstances are shadowed by their colonial past that represents a “feudal system of indentured service...that existed between the Newfoundland merchants and fisherman for centuries” (Finch, 2009, p. 49). Confederation with Canada opened the island up to increased visitation, which quickly became a desirable place to travel for those wishing to capture the nostalgia of a seemingly untouched landscape (Overton, 1980). Tourism has proven lucrative in times of economic crisis. Today, it is one of the only industries keeping some outport communities from disappearing (Greenwood, 2013; Overton, 2007). According to the Department of Tourism, Culture and Recreation, two such communities are “Brigus and Trinity, because they are kind of primary tourism industry towns now, in the sense that they almost don’t exist for any other reason” (personal communication, Heneghan, 2012). These communities, too, have experienced an increase in seasonal residents (Brigus, CBCL Ltd., 2013; Trinity, CBCL Ltd., 2011). For these reasons, Brigus (Figure 4.4) and Trinity (Trinity Bight) (Figure 4.9) provide favourable conditions to conduct this research, and are discussed in greater detail in Chapter 4.

## **4 Methodology**

### **4.1 Introduction**

This chapter presents the research methodology, and is divided into six sections. First, the research intent, objectives, and question, are restated. Second, the research paradigm and methodological approach to this study is explored. Third, justification is given to the mixed methods strategy used by the researcher. Fourth, the research design is provided, which explores the approach taken to gather and analyse qualitative and quantitative data through the explanatory research model. Fifth, ethical considerations and research limitations are stated. Last, an outline of both study sites, Brigus and Trinity (and Trinity Bight), is presented.

### **4.2 Research Intent, Objectives and Questions**

The goal of this study is to examine the process of counterurbanization-led neo-endogenous development in relation to cultural heritage tourism in two path dependent regions of rural Newfoundland. The central question this research explores is,

Is counterurbanization-induced neo-endogenous development contributing to the creation of a cultural heritage tourism path in rural Newfoundland? The study is guided by several objectives.

1. To understand the role that counterurbanites are playing in the development of a rural tourism trajectory. Specifically, to determine:
  - i) The types of development (i.e. civic, public, private)
  - ii) The timing of, and processes involved with, development
2. To understand the types, and motivations, of rural in-migrant tourism operators who chose to operate a business in rural Newfoundland. Specifically, to determine:
  - i) If lifestyle oriented counterurbanites (newcomers or returnees; seasonal or year-round) are the dominant cohort.
3. To assess the impacts of counterurbanites (newcomers, returnees; seasonal and year-round) on local residents. Specifically, to determine if they are,
  - i) Mobilizing local labour
  - ii) Building local capacity

### 4.3 Research Paradigm

A Critical Realism (CR) worldview<sup>19</sup> guides this research. More specifically, this research takes a CR approach to determine the underlying mechanisms that facilitate social events. The following sections provide a more in-depth description of the CR paradigm including the ontology, epistemology, and methodology associated with this worldview.

The philosophy of *realism* is defined as “the view that entities exist independently of being perceived, or independently of our theories about them” (Philips, 1987, p. 205). This is confirmed by Sayer (2000), who suggests that “the defining feature of realism is the belief that there is a world existing independently of our knowledge of it” (p. 2). *Scientific realism* (SR), thus, “claims that the principals of our best scientific theories are true and that we are warranted in accepting the entities they postulate into our ontology” (Chernoff, 2007, p. 399). *Critical realism* is a reflexive philosophical, meta-theoretical position (Archer et al., 2016), which recognizes a world independent of social constructions, ideas and assumptions exists, but also accepts “a form of epistemological constructivism and relativism (our understanding of this world is inevitably a construction from our own perspectives and standpoints)” (Maxwell, 2012, p. 5). Furthermore, Murphy (1990) argues that critical realists “see scientific models and theories not as literal pictures of reality but as partial, tentative representations of what there is” (p. 296). According to critical realist philosopher Arthur Peacocke (2004), CR emerges from SR, however differs in that “models and hypotheses are regarded as ‘candidates for reality’, that is, models of, hypotheses about, a real (but only imperfectly known) world to which the models approximate and the hypotheses genuinely refer” (p. 21, see also Losch, 2009).

Over the years, much debate has generated around the exact nature of CR to SR. Perhaps this stems from the various forms of realism (see Campbell, 1998; Maxwell, 2012), and affirmation that CR “is not a homogeneous movement in social science” (Danermark et al., 2002, p. 1). Some argue that SR and CR have been treated interchangeably (Joseph, 2007), while others find them incompatible (e.g. Nash, 2005). All the while, critical realists assert that debate is healthy because the nature of CR *is to be critical* (Chernoff, 2007). Needless to say, a detailed explanation of this multifaceted philosophy(s) is beyond the scope of this thesis. As such, the

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<sup>19</sup> Worldview and paradigm are used interchangeably as Creswell (2009) indicates that the phrasing is largely depended on the researcher.

following sections touch on the main assumptions of CR.

Critical realism came to light in 1979<sup>20</sup>, by the British philosopher and sociologist Roy Bhaskar<sup>21</sup>. The CR movement emerged to heighten the necessity of ontology (what we believe exists and the nature of it), and to address competing ideologies between positivist (natural science) and interpretivist (social science) paradigms (Bhaskar, 1979). The notion that there is an objective world independent of human subjectivity, which consists of “people’s perceptions, language, or imagination”, is fundamental to CR (O’Mahoney and Vincent, 2014, p. 2). However, CR also holds the belief that there is a subjective interpretive world that shapes the way humans experience and perceive events (O’Mahoney and Vincent, 2014). Critical realism, therefore, recognizes the importance of both natural and social science to provide a compressive account of ontology and epistemology (Fletcher, 2017).

Since its inception, CR has been embraced by many disciplines, some of which include geography, sociology, and economics (Mingers, 2006). Yeung (1997) suggests that as part of the social sciences, CR is “a scientific *Philosophy* that celebrates the existence of reality independent of human consciousness (realist ontology), ascribes causal powers to human reasons and social structures (realist ontology), rejects relativism in social and scientific discourses (realist epistemology) and reorientates the social sciences towards its emancipatory goals (realist epistemology)” (p. 52). A CR paradigm aims to provide consistency in science by questioning both approaches and adding further *realist* insight. Mingers (2006) describes a “*realist* understanding” as one that “takes the view that certain types of entities—be they objects, forces, social structures, or ideas—exist in the world, largely independent of human beings; and that we can gain reliable, although not perfect, knowledge of them” (p. 14). Herein lies the crucial argument of CR, that the relationship between ontology and epistemology, as what we believe exists (ontology) in the world, influences our knowledge (epistemology) of the world. To this

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<sup>20</sup> CR philosophy existed before 1979; however, Roy Bhaskar evolved the concept into a modern day philosophy with his work titled *A Realist Theory of Science* (1975) and *The Possibility of Naturalism* (1979).

<sup>21</sup> Critical Realism was formed by Bhaskar via merging Critical Naturalism and Transcendental Realism (topics from his 1975 and 1979 publications). Critical Naturalism holds that “social reality is pre-interpreted (or effectively shrouded by a veil of interpretative material)” (Bhaskar, 1979, p. 162). Critical Naturalism differs from Naturalism in that “The production of meaning is seen as law-governed but not determined; and the conceptual activity of social agents as at once both necessary for, and necessitated by, social structures subject to critique both for what it presents and for what it obscures” (Bhaskar, 1979, p. 136). Transcendental Realism suggests “laws remain transfactual in form, but are now concept-dependent in their mode of operation. And concepts do not exhaust social reality, but rather themselves stand in need (in principal) of social explanation” (Bhaskar, 1979, p. 152).

end, our knowledge of the world has an impact on our ability to learn about what we believe exists.

Critical realism philosophy rejects empirical realism (positivism) and metaphysical realism (constructivism) on the grounds that they neglect ontology realism (Archer et al., 2016). Explained below by Archer et al (2016), CR,

...situates itself as an alternative paradigm both to scientific forms of positivism concerned with regularities, regression-based variables models, and the quest for law-like forms; and also to the strong interpretivist or postmodern turn which denied explanation in favor of interpretation, with a focus on hermeneutics and description at the cost of causation (p. 4).

An empiricist approach requires that knowledge be “open to the senses and able to be observed by others” (Mingers, 2006, p. 11). In other words, something that cannot be visualized via experimental instruments does not exist. This approach takes a positivists stance in that observations necessitate quantification and must be comprehensible through mathematics. Interpretation beyond this is thought to be irrelevant (Mingers, 2006). This approach generates criticism by constructivists, who describe empirical realism as lacking meaning “when not applied to objects of possible experience; that is to the world of sense” (Bhaskar, 1975, p. 27).

In short, the two approaches create conflict between functionalists (positivists) and interpretivists (constructivists). The latter professes that science is unable to attain meaning in the social world because of the complexity involved in the understanding of observations (Mingers, 2006). The former argues that constructivists fail to provide meaning “if a proposition was not empirically verifiable” (Bhaskar, 1975, p. 27). The traditions known in the philosophy of science include empiricism (positivists), interpretivists (transcendental idealism, constructivist), and critical realism (transcendental realism). The latter two reject classical empiricism on the grounds that it fails to recognize the importance of social activity in the search for knowledge. Transcendental realism, however, is critical of transcendental idealism because the philosophy argues that there would be no knowledge without human activity. Transcendental realism acknowledges the intelligibility of science to understand the natural world as also being independent of humans (Bhaskar, 1975). Yet, ontology is dependent upon epistemology simply because the ability to generate knowledge is a condition of what we are capable of knowing (Bhaskar, 1975). To further the understanding of this concept, an overview of CR ontology is provided.

### 4.3.1 Critical Realism Ontology

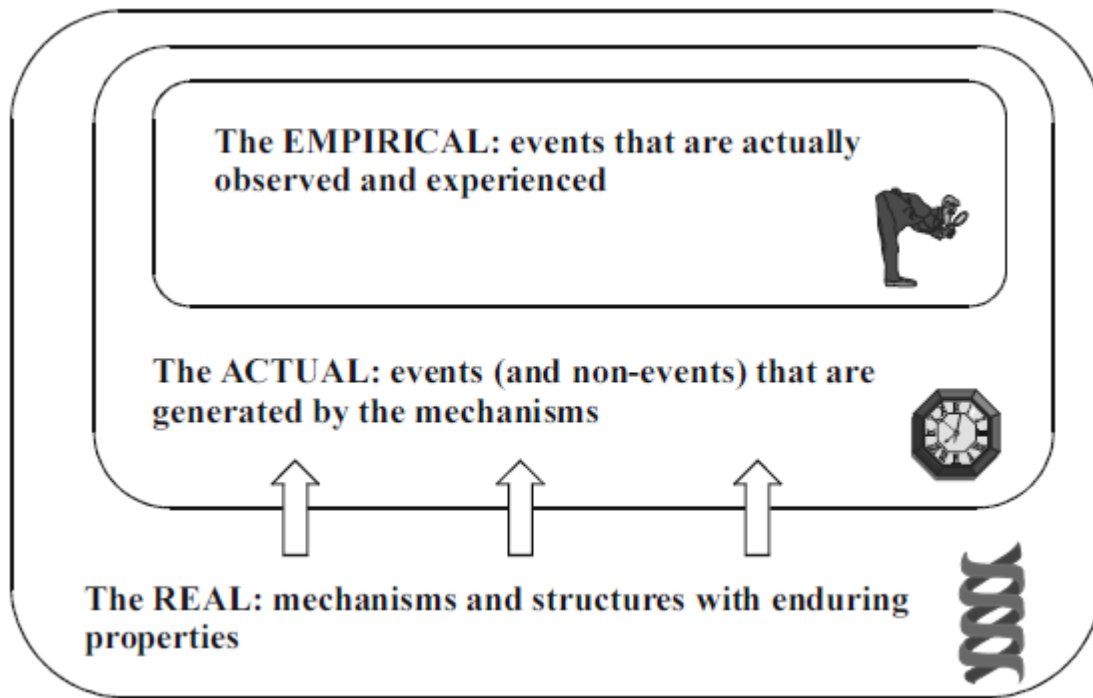
One of the main arguments of CR is to separate ontology from epistemology; albeit the two are in a state of constant interaction. In doing this, CR departs from Classical Realism in favour of transcendental realism, which “sees nature as real; and science as our persistent effort to understand it” (Bhaskar, 1975, p. 229). To accomplish this, one must view the world in two dimensions: *transitive* and *intransitive*. To critical realists, ontology relates to the “‘transitive domain’ of fallible, theoretical interpretations of reality, whilst on the other hand, ontology is taken to be a direct representation of the ‘intransitive domain’, meaning the reality beyond our knowledge” (Cruickshank, 2003, p. 567). To explain this, Verstegen (2006) uses the concept of ‘value’, and questions if what humans think of as valuable is merely the “social effects wrought by conditioning” (p. 325). He argues, that to critical realists, “Even if we understand value imperfectly in the epistemological or transitive realm, it still might exist in the ontological or intransitive dimension” (Verstegen, 2006, p. 325).

Critical realism claims that there is a reality that exists separately from our perceptions, experiences, knowledge, and awareness (Archer et al., 2016). As such, CR rejects relative ontology, which contends that the nature of things must be observable (Sayer, 2000). In this regard, relative ontology undermines the CR premise of generative mechanism-produced events; some of which may never be realized, experienced, or observed (Sayer, 2000). In this sense, there are no social structures independent of objects and mechanisms that govern the occurrence of such events. Rather, CR argues that laws that constitute and govern the natural world are not impeded by their own existence (Sayer, 2000).

Despite ontological primacy, CR does not reject the notion that the ability to investigate and create epistemologies is located in the social world (Duayer and Medeiros, 2005). Therefore, some beliefs, theories, and ideas about the world are necessary (Ackroyd and Fleetwood, 2004). To some (Archer et al., 2016), this is complex, since beliefs are not quantifiable or verifiable; thus questionable when expressed through language, theory and empirical presentation. But, as articulated by Sayer (2000), CR acknowledges that “the world can only be known under particular descriptions, in terms of available discourses, though it does not follow from this that no description or explanation is better than any other” (p. 2).

Stratified ontology, illustrated in Figure 4.1, is useful for theoretical applications of CR. Stratified ontology is described in three layers: the *real* (generative mechanisms--structures and

mechanisms<sup>22</sup> that may be observable or unobservable that produce events or non-events), the *actual* (events or non-events that occur whether experienced or not), and the *empirical* (what is actually observed) (Bhaskar, 1978, p. 13).



**Figure 4.1** Bhaskar's Stratified Ontological Reality

Source: Mingers (2006, p. 23)

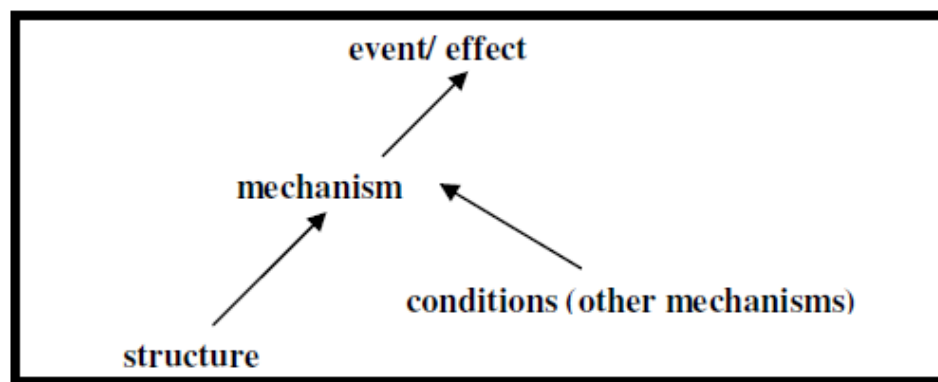
Aastrup and Halldórsson (2008) assert that the “most fundamental assumption in critical realism, whether studying social or natural phenomena, is the existence of generative mechanisms that create events” (p. 751). Bhaskar (1975) describes generative mechanisms as something largely unnoticed to the average person, circumstantial as opposed to deterministic, as structures that embody causal powers<sup>23</sup> that may or may not be activated depending on the conditions. As such, CR is concerned with “identifying the real, relatively enduring, structures and causal mechanisms underlying what we observe and experience” (Dickens, 2003, p. 98), which, in turn, manifest the generative mechanisms that produce events in the empirical domain, thus

<sup>22</sup> Mechanisms or casual mechanisms are sometimes described as “causal powers”. Causal power is the terminology used by the researcher throughout this thesis.



“constituting the actual domain” (Aastrup and Halldórsson, 2008, p. 751). This is illustrated in Figure 4.2.

Aastrup and Halldórsson (2008) describe the iceberg metaphor with the example of gun powder as an object that “through its chemical structure has the potential to explode under certain conditions” (p. 751). Causal powers and their subsequent events are contingent on present conditions, thus, “Powder only explodes in the presence of sparks” (Aastrup and Halldórsson, 2008, p. 752). Gun powder may or may not have the causal power to explode. This will depend on the present conditions (i.e. sparks or no sparks—the event). Through causal analysis, we can examine “why objects possess certain powers and liabilities, and how these powers and liabilities change over time. The powder has the potential to explode, is explained in terms of its chemical structures” (p. 752).



**Figure 4.2** Critical Realists View of Causation

Source: Sayer (2000, p. 15)

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<sup>23</sup> Causal powers, causal laws and causal mechanisms are sometimes used interchangeably within the critical realism literature. Here, they are not to be confused with generative mechanisms, although they are closely related. Causal powers, laws or mechanisms are analysed in the form of tendencies, which “may be regarded as powers or liabilities of a thing which may be exercised without being manifest in any particular outcome” (Bhaskar, 1975, p. 3). In other words, causal powers, laws or mechanisms, and their liabilities (real domain), “are the central issue in causal analysis; these are regarded as the generating or producing forces of events” (Aastrup and Halldórsson, 2008, p. 751). Causal powers “represent the object’s ability to activate a [generative] mechanism, whereas liabilities represent inherent limitations to do so” (Aastrup and Halldórsson, 2008, p. 751).

Blundel (2007) explains Figure 4.2 with the use of examples. For one, he depicts a water molecule as an *object* with a *structure* that consists of hydrogen atoms fusing with oxygen atoms. Such objects withhold *causal powers* because of the nature of their *structure*. Causal powers are the abilities, potentials and capacities afforded to an object. As such, “water has the capacity to extinguish a fire” (Blundel, 2007, p. 51). For another, he considers an entrepreneurial network an object with social interactions as its structure. The objects (e.g. business owners) that constitute an “entrepreneurial network can form the basis for a series of different ventures over time”, depending on which causal powers are activated under particular conditions (Blundel, 2007, p. 51). Generative mechanisms “can give rise to concrete phenomena, such as an event that we might experience”, when a structure’s causal powers are activated (Blundel, 2007, p. 51). But, “activation of causal powers is not automatic, since it depends on the presence of other conditions” (Blundel, 2007, p. 51). With reference to the entrepreneurial network, “two individuals might have similar capacities to become successful entrepreneurs, yet due to differing conditions (e.g. prevailing socio-economic conditions in their respective home regions), only one of them might realise her potential” (Blundel, 2007, p. 51). The ontological approach of stratified reality shown above provides a platform for critical realists to engage in epistemology. This is explained in further detail as follows.

#### **4.3.2 Critical Realism Epistemology**

Critical realism accepts that the world is socially constructed (but not entirely) (Easton, 2010). Yet, our epistemologies often limit the way we construct theories. Moreover, important characteristics of the world may not be entirely represented through theory, language and numbers (Roberts, 2014). This is what Bhaskar (1975) coined the “epistemic fallacy”, which is: “statements about being can always be transposed into statements about our knowledge of being” (p. 5). Simply put, this is false. Ontology cannot be reduced to epistemology (Bhaskar, 1975). This argument is supported by Alvesson and Sköldbberg (2009), who argue it is “not possible to reduce the world to observable objects and facts”, and thus deriving answers from “social constructions is insufficient and misleading” (Alvesson and Sköldbberg, 2009, p. 40). To Sayer (2000), “‘strong’ social constructionism is founded on an epistemic fallacy in confusing its social constructs or interpretations with their material products or referents, and in confusing researchers’ constructions with those of the people they study” (p. 102).

To rectify this confusion, Bhaskar (1975) proposed the intransitive and transitive domains of reality. Botterill (2007) suggests that:

...critical realism proposes a differentiated ontology of social reality divided into the 'transitive domain' (our theories, concepts and discourse of research) and the 'intransitive domain' (the largely enduring structures and properties of objects that enable and constrain human agency) (p. 122).

Stratified ontological reality, illustrated in Figure 4.1, is equated with intransitive and transitive domains of reality. The intransitive domain consists of the *real* causes that trigger the *actual* events, and the transitive domain consists of the *empirical* events that are observed (Boateng, 2014). The dimension of transitive knowledge consists of the theories, assumptions, and discourse that have been formed through the examination of the enduring structures and properties of objects in the intransitive domain. Groff (2004) explains that a person "who commits the epistemic fallacy implicitly equates the intransitive and transitive objects of science by suggesting that statements about the former are equivalent to statements about the latter" (p. 18). Groff (2004, p. 19-20) draws three main conclusions about CR epistemology. These are,

- Our knowledge of the world is fallible. But, "we are justified in *believing* a claim to be true", and our knowledge is "well-supported-beliefs-that-might-be-false".
- Scientific inquiry is an "active process" and "inherently social". This constitutes human experimentation of the world and the perpetual transformation of existing theories.
- Scientific interpretations of the world are grounded in theories. Ontology and epistemology cannot produce conclusive facts. As such, our "cognitive encounter with the world is mediated by concepts", which indicates that our knowledge of the world in theoretical narratives limits our knowledge of the world itself.

In other words, CR accepts that what we know exists in the social domain. Yet, it argues that social constructions cannot capture the world in its entirety as there is a world that exists independent of humans (Easton, 2010). A stratified ontology of reality allows for the explanation of events through the intransitive and transitive domains. The intransitive domain consists of causal powers, events, and mechanisms that exist regardless of whether they are experienced or not. The transitive domain consists of events that are observed. Put another way, CR aims to:

...re-establish a realist view of *being* in the ontological domain whilst accepting the relativism of knowledge as socially and historically conditions in the epistemological domain...In other words, to establish that there is an independently existing world of objects and structures that are causally active, giving rise to the actual events that do

and do not occur. But at the same time, to accept criticisms of naïve realism and to recognize that our observations and knowledge can never be pure and unmediated, but are relative to our time period and culture” (Mingers, 2006, p. 19).

Since it is not possible to fully understand the social world, an epistemological meta-theoretical framework guides this research, which consists of, but is not exclusive to, three main bodies of literature: rural change, counterurbanization, and cultural heritage tourism. Theories, concept, and ideas taken from this framework are used to help interpret and explain (fallibly) the events of this research. The reason for this meta-theoretical framework is because CR stipulates that a common error of social science is to regard ontology as something that can only exist within the epistemological realm (Mingers, 2006). Rather, CR necessitates realist ontology, as the world exists regardless of the human element; thus theories are value-laden and not value-determined (Fletcher, 2017), and only time-space relative. As such, knowledge taken from the meta-theoretical framework should be reconstructed via abductive and retroductive processes, which entails positioning of the researcher to re-examine theories that account for social phenomena. This process is explained in greater detail hereafter.

#### **4.3.3 Critical Realism Methodology**

There is much debate about the legitimacy of CR as a methodology. Some criticisms include the idea that CR methodology complicates empirical research, and that it is an inadequate approach to uncovering qualitative aspects of the social world (Roberts, 2014). A central argument questions how we can do science in critical realism without committing an epistemic fallacy (see Sayer, 1993), since conclusions may be flawed because the means by which they were attained, are flawed. In defense, Wikgren (2005) legitimizes the CR approach, and sets the stage for development of a CR methodology. He argues that CR:

...assumes an ontological realism (there exists a mind-independent reality and truth is correspondent with fact) and defends the possibility of causal explanation, but also accepts the hermeneutic notion that knowledge is communicatively constructed, that our concepts and beliefs are historically generated and conditioned, and that the explanatory knowledge produced through realist analysis will always be open to challenge the subject to change on theoretical and empirical grounds. This epistemological relativism is combined with a judgment rationality, which asserts that science is not arbitrary, and that there are rational criteria for judging some theories as better and more explanatory than others. Thus, scientific theorising is considered the best (although fallible) method for gaining knowledge of that mind-

independent reality, even when it transcends the boundary of the observable (Wikgren, 2005, p. 14).

In essence, transitive knowledge (e.g. theories, assumptions) can always be improved upon with respect to what we consider to be the best possible explanation of the truth. Having said that, CR is in favour of “judgemental rationality”, as opposed to “judgemental relativism”; the former follows a realist ontology and relativist epistemology, in that there are certain criteria that are better suited to investigate the world than others (Archer et al., 2016). In other words, CR argues that it is “possible for social science to refine and improve its knowledge about the real world over time, and to make claims about reality which are relatively justified, while being historical, contingent, and changing” (Archer et al., 2016, p. 7).

As it stands, a CR approach to achieving *justified* truth is accomplished through abduction and retroduction methods of inference (Mingers, 2006). The most common modes of inference used in social science (Olsen, 2007) are drawn from Meyer and Lunnay (2013), and listed below,

- *Induction*: draws broad generalizations and conclusions from specific data sets and experimental observations. Results are likely to be true but not certainly true.
- *Deduction*: begins with a general idea or hypothesis and predicts outcomes and draws conclusions based on a theory. Conclusions are either valid or invalid or false or true.
- *Abduction*: begins with observations and makes attempts to find the best logical explanations. It is not context specific, and outcomes are only probable.
- *Retroduction*: extends knowledge by drawing logical conclusions from existing data to determine what is most likely to be true, while not limiting circumstances to something known to exist.

Abduction (inference to best explanation via interpretation and recontextualization of events through a conceptual framework or suite of ideas) (Eastwood et al., 2014), and retroduction (identifying most likely conditions and causal powers of social structures) modes of inference, are fundamental to CR (Elder-Vass, 2010). O’Mahoney and Vincent (2014) explain that abduction “re-describes the observable everyday objects of social science...in an abstracted and more general sense in order to describe the sequence of causation that gives rise to observed regularities in the pattern of events” (p. 17). Complimentary to this, retroduction is:

...where we take some unexplained phenomenon and propose hypothetical mechanisms that, *if they existed*, would generate or cause that which is to be

explained. So, we move from experiences in the empirical domain to the possible structures in the real domain...The structure could be physical, social or psychological, and may well not be directly observable except in terms of its effects (e.g., social structures) (Mingers, 2006, p. 23).

During the retroduction stage, “we look for the necessary conditions to make the phenomena possible...Contextual conditions play an important role in the realist understanding of causality because causal powers may only result in an event occurring under certain conditions” (Eastwood et al., 2014, p. 9). Therefore, according to Sayer (2000), what “causes something to happen has nothing to do with the number of times we observe it happening”, rather, explanation requires the identification of causal powers, how they are activated under certain conditions, and the generative mechanism that produces the observed phenomenon (p. 14).

The primary distinction between abduction and deduction is that abduction inference seeks possibilities for underlying causes, whereas deduction identifies something to be a particular way (Habermas, 1978). Furthermore, deduction proves or disproves a theory as opposed to abduction where findings located outside of the original theory are further examined (Meyer and Lunnay, 2013). Abduction differs from induction in that “data should not be forced to fit preconceived or preexistent categories, asserting rather that the categories are to be developed from data” (Dubois and Gadde, 2002, p. 556). As such, abductive reasoning has the capacity to produce more outcomes than inductive reasoning as it exceeds inductive limitations (Dubois and Gadde, 2002).

Retroduction is CR’s “distinctive mode of scientific inference and explanation” (Blundel, 2007, p. 50). Easton (2010) describes retroduction as “moving backwards”, and a process that asks “What must be true in order to make this event possible?” (p. 123). Others (Meyer and Lunnay, 2013) further this notion, by suggesting:

Retroductive inference is built on the premise that social reality consists of structures and internally related objects but that we can only attain knowledge of this social reality if we go beyond what is empirically observable by asking questions about the developing concepts that are fundamental to the phenomena under study (p. 3).

A CR approach argues that “the practice of doing social scientific research be no longer perceived as limited to the justification of specific knowledge claims but must be seen as an integral part of the cycle of scientific discovery” (Wuisman, 2005, p. 366). To be specific,

deductive and inductive modes of inference are conclusive and require fixed criteria to contribute to new knowledge. Alternatively, an abduction-retroduction approach does not claim to validate or find definitive answers. Rather, it offers a continuous cycle of new knowledge (Wuisman, 2005). However, CR should not abandon induction and deduction as important tools in the quest for knowledge. Instead, they can be valuable to abduction-retroduction; though they are applied in unconventional roles—“belonging to the preliminary stages of research and fulfilling a complementary role to other modes of inference” (Wuisman, 2005, p. 369).

Relatedly, intransitive and transitive knowledge is generated through open and closed routes of information gathering. Natural science experiments are conducted in closed controlled environments where the researcher introduces specific independent variables into the analysis (Bhaskar, 1975; Porter et al., 2017). Social science is interpretive and explanatory; therefore, independent variables (e.g. social structures or their causal powers) cannot be isolated (Bhaskar, 1975; Collier, 1994). Additionally, CR claims there are different layers of reality; some of which may never be realized. As such, constant regularities only occur in closed systems. Therefore, rather than identifying social laws, social science research should focus on causal powers and the conditions that are necessary to generative the event mechanism (Zachariadis et al., 2013). This is because in open systems, there is no true reality, only one that we can interpret and explain in a given historical and cultural context (Mingers, 2006). Thus, theories and concepts can always be improved upon and altered depending on new discovery. Put another way, Bergene (2007) explains that the “realist ontology implies that reality exists relatively or absolutely independently of human consciousness of it, and epistemologically it entails that our knowledge of it is always fallible, although all knowledge is not equally fallible” (p. 11).

Fletcher (2017) argues that while CR “acknowledges that social meanings, ideas, and decisions can have causal impacts in the world, these social objects do not follow a conception of causal law and the deterministic regularity of Humean constant conjunction<sup>25</sup>” (p. 185). In other words, the prediction of two events occurring in conjunction is impossible as the social world occurs in open systems (Danermark et al., 2002; Fletcher, 2017). Though CR acknowledges that intransitive knowledge is necessary in social science (i.e. reality outside of human

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<sup>25</sup> 18<sup>th</sup> century British Philosopher David Hume (1738) coined the term “constant conjunction” to describe the theory of causation. Hume was adamant that if “A” causes “B”, and they always occur together, then “A” is always correlated with “B”, and thus in constant conjunction.

consciousness), it also recognizes the need for transitive knowledge (theories, concepts) to do social science research. To accomplish this, CR recognizes that pre-existing theories are necessary, and accepts that some research must occur in a closed system (Mingers, 2006). To this end, a CR approach creates a “situation that ‘scientific laws’ always have to be analysed as tendencies” (Danermark et al., 2002, p. 70).

Thus, the process of CR analysis starts with the identification of “‘demi-regularities’ at the empirical level of reality” (Fletcher, 2017, p. 185). Demi-regularities are semi-predictable patterns that may offer explanations to certain behaviour in certain situations. When multiple demi-regularities ensue, it offers the possible explanation that similar causal powers may be related to, and causing, the event (Vareilles et al., 2017). Lawson (1997) provides a definition of a demi-regularity as “precisely a partial event regularity which *prima-facie* indicates the occasional, but less than universal, actualization of a mechanism or tendency, over a definite region of time-space” (p. 204). Furthermore, he argues that “where demi-regs are observed there is evidence of relatively enduring and identifiable tendencies in play” (Lawson, 1997, p. 224). Pinkstone (2002) adds that the nature of a demi-regularity can provide clues as to the direction the researcher may choose to begin to uncover answers. Moreover, the process of qualitative coding, to produce event demi-regularities, allows such tendencies to be realized through the abduction and retroduction phase of analysis (Fletcher, 2017).

Yet, to achieve this step, CR research demands, at least in part, a flexible deductive-inductive approach. In the words of Yeung (1997),

The realist method for theory construction is neither purely deductive, nor purely inductive. It operates rather simultaneously in a deductive-inductive dialectic. On one hand, a realist researcher must constantly resort to critical abstraction that is more deductive in nature. On the other hand, this abstraction and subsequent theoretical construct should not determine the entire concrete research that remains open and flexible. The role of the realist researcher is to achieve a harmonious synchronization between deductive abstraction and inductive grounding of generative mechanisms. Under this argument, a realist researcher should not simply ‘borrow’ an existing theory and fit it into empirical data; nor should the theory emerge solely from concrete data. The most practically feasible method of theorization is an interactive process of abstracting theories based on an immanent critique and the grounding of abstractions in concrete data (p. 63).

In reference to flexible deductive abstraction and inductive concretization of theories, this research methodology adopts a critical realist’s explanatory research model (Table 4.1), which involves the interactive process of moving between the abstract and the concrete (Figure 4.3).



Proposed by Danermark et al (2002), a critical realist's explanatory research model involves six stages: description, analytical resolution, abduction/theoretical redescription, retroduction, comparison between different theories and abstractions, and concretization and contextualization. These stages are discussed in further detail in the research analysis (Section 4.6).

To strengthen the validity of this research, this study takes a novel approach of applying comparative case studies to the critical realist explanatory research model. In this case, comparative case studies, “in which two or more examples are considered that differ little except in theoretically significant aspects”, are “particularly relevant for illuminating the characteristics of generative mechanisms” (Ackroyd, 2004, p. 158). As such, a comparative case study enables the researcher to compare and contrast the similarities and differences of structures and conditions at two sites within the same geographic space (i.e. Newfoundland), and determine their impact on the identified generative mechanisms that produce the observed events. Accordingly, this research methodology involves a critical realist's approach to comparative case research. To do this, qualitative and quantitative methods are used to identify the phenomena under study (demi-regularities), which facilitates the abduction and retroduction process in the critical realist's explanatory research model. Justification of the methods used in this research is presented below.

#### **4.4 Methods**

Different from positivist and interpretivist approaches, CR accepts and uses a wide variety of research methods. Critical realism stipulates, however, that certain research methods are more appropriate depending on the circumstance and object to be studied (Sayer, 2000). Additionally, CR rejects the notion that one particular method can be used without having pre-existing knowledge of the object under investigation (Sayer, 2000). Gorski (2013) describes CR ontological stratification as “the view that the social is built up out of the biological, which is built out of the physical, in a whole series of nested hierarchies” (p. 461). He further suggests ontological stratification would necessitate “relative autonomy of the scientific disciplines”, which is impossible since, for example, “Sociology can never be collapsed into biology, which can never be collapsed into physics”, but, they can complement each other (Gorski, 2013, p. 461). As a result, CR must resort to “methodological pluralism” (Gorski, 2013, p. 461).

In the past few decades, mixed methods are gaining increasing popularity. Creswell and Clark (2007) define mixed methods as a:

...research design with philosophical assumptions as well as methods of inquiry. As a methodology, it involves philosophical assumptions that guide the direction of the collection and analysis of data and the mixture of qualitative and quantitative approaches in many phases in the research process. As a method, it focuses on collecting, analyzing, and mixing both quantitative and qualitative data in a single study or series of studies. Its central premise is that the use of quantitative and qualitative approaches in combination provides a better understanding of research problems than either approach alone (p. 5).

This strategy is also referred to as combined, integrated (Steckler et al., 1992), hybrid (Ragin et al., 2004), multitrait/multimethod (Campbell and Fiske, 1959), methodology triangulation (Morse, 1991), and mixed methodology (Tashakkori and Teddlie, 1998). According to the *Handbook of Mixed Methods in Social and Behavioural Research* (Tashakkori and Teddlie, 2003), mixed methods research is the most universally common reference to this type of study. In line with this statement, the favorable mixed methods terminology is assumed for this study.

The mixed method approach was first developed by Campbell and Fiske in 1959 (cf. Creswell and Clark, 2007). Their original study was formulated and carried out with the use of several quantitative methods (Campbell and Fiske, 1959, cf. Tashakkori and Teddlie, 1998). Over the next few decades, other players contributed to the development of mixed method designs (see Creswell and Clark, 2007). Social scientists, in particular, now consider a mixed methods approach “a legitimate, stand-alone research design” (Hanson et al., 2005, p. 224). Also, as described below, employing two forms of data (quantitative and qualitative) facilitates a “deeper understanding of the phenomena of interest” (Hanson et al., 2005, p. 224). Additionally, the employment of this dual design strengthens the scope of the study by minimizing deficiencies that may result from single method research (Creswell, 2009).

Some argue that a mixed methods approach is problematic because research tools are heavily entrenched in specific worldviews, and the associated methodologies are not compatible (Zachariadis et al., 2013). Those that disagree, known as pragmatists and critical realists, negate this claim by arguing that a mixed methods approach is more concerned with “what works” (Scott, 2007, p. 5, see also Zachariadis et al., 2013). This rebuttal is also confirmed by Tashakkori and Teddlie (1998), who suggest that “for most researchers committed to the thorough study of a research problem, method is secondary to the research question itself, and

the underlying worldview hardly enters the picture, except in the most abstract sense” (p. 21). This statement is in line with a CR worldview that welcomes multiple methods in a single investigation (Sayer, 2000).

Important also, is triangulation in the analysis component of CR. Downward and Mearman (2007) argue that “retroduction requires the ‘triangulation’ of research methods” (p. 78). Further justifying CR methodology, Downward and Mearman (2007) suggest that triangulation can:

...under certain assumptions, be argued to unite research contributions in such a way as to transcend the use of specific methods in a disciplinary sense. This follows from drawing a distinction between methods of analysis and research methodology and, in particular, the ontological justification offered for the use of different methods of analysis (p. 78).

Triangulation has been contested as having “considerable barriers to combining different paradigms in actual research practice”, particularly “between theories and methods rooted in different paradigms” (Modell, 2009, p. 208). Critical realism, however, is a “meta-theoretical position: a reflexive philosophical stance concerned with providing a philosophically informed account of science and social science which can in turn inform our empirical investigations” (Archer et al., 2016, p. 4). Unlike other paradigms, CR is not “rooted” in any particular stance, rather, it is a “philosophical well” (Archer et al., 2016, p. 4) that does not identify exclusively with either measurable (positivism/post-positivism) or explanatory (interpretivism/constructivism) methods (Danermark et al., 2002).

With support from the arguments above, a mixed methods approach to comparative case research was chosen for this study. This involved the gathering of secondary data, distributing questionnaires, and conducting interviews. Qualitative and quantitative methods were used concurrently to provide comprehensive insight into the research problem. Qualitative data typically takes the form of open-ended information (e.g. interviews, participant observation, primary data assemblage) gathered by the inquirer. Quantitative data usually consists of closed-ended material (e.g. surveys, instruments) (Creswell and Clark, 2007). Concurrent mixed methods necessitate both forms of inquiry to allow for a holistic integration, and interpretation and explanation of the outcomes (Creswell, 2009). Creswell (2009) suggests that the assimilation of qualitative and quantitative data can occur at multiple stages throughout the study (i.e. collection, analysis, interpretation, explanation). In addition, this research takes a stance

proposed by Creswell and Clark (2007) that “advocate for honoring different paradigm perspectives”, and highlights “that investigators may view mixed methods research strictly as a “method”...thus allowing researchers to employ any number of philosophical foundations for its justification and use” (p. 27, cf. Creswell 2003).

In brief, this study takes a critical realist approach to comparative case research. To begin, flexible deductive inference *assists* in the creation of the epistemological meta-theoretical framework, which guides the research based on a suite of concepts and ideas (Chapter 2). Concurrent mixed methods are used to conduct this investigation. The analysis employs a critical realist explanatory research model (described in detail later on) that includes abduction and retroduction processes. Concretization and contextualization of the research conclusions is *assisted* with flexible inductive reasoning. The following sections explain this process.

## **4.5 Data Collection**

This study consists of primary and secondary research. Primary research was undertaken via surveys and interviews. Secondary research was done by analysing documents, such as those available on the internet and in hardcopy. These sources of information are explored below.

### **4.5.1 Secondary Research**

According to Stewart and Kamins (1993), secondary sources of information offer “quick and inexpensive answers” and are “almost always the point of departure for primary research” (p. 1). Secondary information can be found in books, journals, newspapers, archives, public and private sector reports, and from the internet (Stewart and Kamins, 1993).

Secondary research was conducted through internet searches (e.g. local, provincial and national government websites, rural development organizations). Background information was necessary to determine appropriate case study sites in Newfoundland. Most tourism-related businesses were assumed to be documented on provincial tourism webpages. Some key pieces of information retrieved from secondary sources were: the type of tourism venue (e.g. accommodation, entertainment), distance between potential study sites and St. John’s (feasible and accessible for researcher), and the concentration of tourism activity (highest number of tourism venues).

Two well-known tourism destinations, Brigus and Trinity (Bight), met these criteria. These locations have a high concentration of tourism activity, as listed in the TourBook Guide (2012), provincial tourism websites, and found on the Tourism Newfoundland and Labrador webpage. The communities were within driving distance restrictions, and offered a variety of visitor amenities. All businesses used in this study were later confirmed as being ‘tourism-related’ by respondents. This was established via their completion of a questionnaire survey.

#### **4.5.2 Primary Quantitative Data**

Surveys are designed using open and closed-ended questions. Open-ended questions are advantageous as they encourage the participant to speak freely. However, they can be time consuming and conclude incomplete responses (Bryman, 2008). Closed-ended questions are structured with fixed answers and can allow for the quick collection of information. Though, closed-ended question can be disadvantageous by omitting important information such as participant opinions or explanations (Bryman, 2008). Surveys are popular in cultural heritage tourism research. As Duhme (2012) suggests, questionnaires can be instrumental in gathering behavioural and motivational data. Semi-structures interviews are preferred over structured interviews in CR research as they are flexible (Easton, 2010). This allows the researcher to be less constrained, thus, able to “establish plausible cause [powers]” from the data (Easton, 2010, p. 124).

##### **4.5.2.1 Business Surveys**

Business surveys were used to collect background data on all firms located in both study areas. A general business survey was distributed to each business in Brigus and Trinity Bight. This preliminary survey was used to eliminate non-tourism related businesses. Businesses that were not regarded as tourism-related were those that offered year-round, locally-driven services (e.g. post office, convenience store). The initial questions asked the owner/operator to indicate whether or not their business caters to tourists, and the percentage of sales generated from non-local visitors. Businesses that were considered to be tourist-related identified their business as catering to tourists, with more than half of their revenue coming from non-local visitors. The purpose of this question was to further eliminate firms that were not tourism-orientated.

Surveys were conducted in Brigus during the month of June and Trinity Bight during the month of July, 2012. The date of distribution reflected the order that the community was researched. Business surveys were distributed during the summer season (June, July, August) because tourism is primarily seasonal in rural Newfoundland.

Administering business surveys was done in-person by the researcher. Given time constraints and seasonal business occupancy, the researcher assumed hand-delivering would optimize the likelihood of the owner receiving the survey, and result in a more timely response. Furthermore, personal communication was viewed as important to establish rapport with community members. Exceptions were made when the owner was unable to receive a survey in person (e.g. work from home, too busy to fill out survey). In this case, surveys were completed by senior firm operators on behalf of the owner. Survey distribution occurred during business hours. Survey collection was also conducted in person to encourage a higher response rate and to further communicate with local business owners. Additionally, personal distribution and collection of surveys was favorable to enhance the researcher's awareness and sense of the businesses daily operation.

Business surveys began with an invitation letter to the participant. The letter offered information about the researchers and their affiliated institution, the purpose of the study, and the conditions of their contribution (e.g. voluntary, confidential). The survey asked a series of 42 questions divided into two sections. It requested business and personal information, and was comprised of open and closed answer questions. Open-ended questions were necessary to collect data that could not be disclosed using a yes, no, or do not know answer. The purpose of closed-ended answer questions was to gather statistical information that is difficult to calculate without definitive yes, no, or do not know, answers. A Likert scale was used to gain insight into respondent's positions on a number of topics. A Likert scale is commonly used to gauge participant perceptions in cultural heritage tourism research (e.g. Jackson, 2008; Willis and Kinghorn, 2009), entrepreneurial motivations research (e.g. Douglas and Bendell, 2010; Vijaya and Kamalanabhan, 1998), and studies of path dependence and local development (e.g. Cirman and Ograjenšek, 2014; Methorst et al., 2014). This was done so by providing a number of possible answers to gauge interviewee attitudes, such as 'strongly agree, agree, neutral, disagree, and strongly disagree'.

#### **4.5.2.2 Resident Surveys**

The purpose of the resident survey was to gain a general understanding of community demographics. Since Trinity Bight consists of twelve small communities, the researcher was limited to surveying Trinity; the most tourism concentrated town in the region. Surveys were used to investigate residential history, and the role of residents, if any, in the local tourism industry. The resident survey also served the purpose of identifying residents who own a business related to tourism that may not have a storefront (e.g. walking tour). Residents who owned a business were contacted further for an interview. An option to decline the request for an interview was provided at the end of the survey. The researcher reviewed business surveys and omitted those who responded to the resident survey to prevent overlap. The resident survey also asked the participant to discard the survey if they had already completed a business survey.

Consistent with business surveys, residents were asked a total of 34 open and closed-ended questions. Questions were designed to gather personal information and were yes, no, or do not know, specific. A Likert scale was also used to gain resident perceptions and attitudes towards tourism in their community. Delivery of resident surveys was initially uniform in both study sites. The researcher had intended to self-administer surveys at each house. However, this proved to be challenging as many properties were discovered to be vacant most of the year. Interestingly, this observation provided insight into the nature of local and non-local actors in the tourism scene. This revelation will be discussed in later chapters. Permanent and seasonal residents were identified and located in both study sites. An advantage to the drop-off and pick-up method was information gathered through resident-researcher conversations. Conversely, this method was not always practical; both communities, therefore, were assigned different methods as indicated below.

#### **4.5.2.3 Brigus Resident Survey Distribution**

The town of Brigus is small and compact. The researcher could walk, at a moderate pace, from the south to north end of town in approximately 15 to 20 minutes (the same can be said with respect to east to west). The tight perimeter of the community was favourable to self-administered residential surveys. The small population permitted the researcher to approach all households within the town limits. Residents were asked to complete the survey within one week. Surveys were collected personally over the period of approximately one month. The

remainder of surveys were gathered at various times throughout the summer season. The researcher returned to each residence until the survey was collected or until it was determined that the home-owner did not wish to participate.

#### **4.5.2.4 Trinity Bight Survey Distribution**

The challenges with survey delivery in Trinity Bight were a) the dispersion of residents; and b) undistinguishable vacation homes that were not registered as businesses and/or commercial properties. Unlike Brigus, the area known as Trinity Bight is sparsely populated. This made it challenging to locate residential properties and to conduct surveying in a timely manner (one month allocated). The presence of vacation homes was a major challenge. It was difficult to differentiate vacation homes from other residential properties. The researcher would either encounter renters or a vacant home. For these reasons, an alternative method of surveying was sought.

The Trinity Town Clerk was consulted for suggestions about the best way to contact survey participants. It was decided that only Trinity residents would receive questionnaires for two reasons. First, Trinity is one of the top tourism destinations in the province; therefore, the impacts of tourism were perceived to be greater on local residents. Second, the Town of Trinity was the only community that could offer a registry of residents' permanent addressees. A record of permanent and seasonal home-owners in Trinity was provided from the Town Clerk. The index listed the *primary address* of the home-owner and was used as a catalogue for mail-out resident surveys. A number of homes were found to be owned by one individual. An invitation to participate in the study, along with the study details, was provided. Pre-paid, mail-back envelopes accompanied each questionnaire. Instructions were given to mail back the survey to the University of Waterloo.

### **4.5.3 Primary Qualitative Data**

#### **4.5.3.1 Interviews**

Interviews are one of the most common methods used to gather qualitative data (Tuner, 2010). In-depth opinions, experiences, perceptions, and life histories offer rich information that may not otherwise be attainable through quantitative techniques (Creswell, 2009; Turner, 2010). According to tourism and social science literature, there are three approaches to interview



design: structured, semi-structured, and unstructured (Finn et al., 2000). Structured interviews are most appropriate to gather quantitative information. Alternatively, semi-structured and unstructured interviews are interpreted qualitatively (Gill et al., 2008). Like surveys, interviews can be designed in the form of open and closed-ended questions. Found in cultural heritage tourism studies (Richards and Munsters, 2010), rural development and path dependence research (Stone and Stubbs, 2007), and studies of entrepreneurial migration (Aarset and Jakobsen, 2015), interviews are employed as a supplement to quantitative data in the second stage of a research project (Fox et al., 2010).

#### **4.5.3.2 Business Interviews**

Business owners that indicated willingness to participate in an interview were contacted. Consent was typically indicated on the survey (otherwise verbally) during the initial stage. Participants were contacted via phone or in person. Interviews were conducted with business owners (with the exception of one) at their business address. Interviewees who did not fill out a questionnaire were provided with an invitation letter. In addition, the researcher vocalized an abstract of the study details. Oral permission to use an audio recording device was granted at the commencement of the interview.

Seven business owners/operators from Brigus, and thirteen business owners/operators from Trinity Bight, were interviewed. Interviews were originally designed with 19 semi-structured, open-ended questions. Some advantages of semi-structured interviews are a) the collection of important contextual information; and b) the quantifiable capacity awarded with pre-determined questions. However, the researcher determined that survey information provided in the initial stage may inhibit the quality of the information gathered during the interview process. Similar experiences are shared by Fox et al (2010), who believe that semi-structured interviews limit their findings by excluding important information. Therefore, minor adjustments were made to preliminary questions to align with knowledge gathered from the surveys.

A more unstructured approach was taken as completed interviews grew in number. This required follow-up with former participants to fill the gaps realized from other interview sessions. However, all initial interview questions remained. Unstructured information typically came from extended conversations. Participants were asked to provide information regarding inherent and acquired traits (e.g. age, education level). Non-statistical questions were also asked

for the purpose of contextual information. Queries were absent of suggestive language and time constraints. All interviews, with the exception of one business, were consensually recorded. Interviews ranged in length from 30-45 minutes. Sessions that went longer than the allotted time were the result of the participant's willingness to speak further. Those that requested a transcript were provided with one prior to the use of the data. Contributors were thanked for their participation at the completion of the interview.

The small community size proved to be advantageous to further conversation with business owners/operators. The odds of crossing paths with local entrepreneurs were in the researchers favour. This proved to be beneficial because it facilitated deeper relationship building with community members. As a result, increased contextual knowledge was gained through personal observation and note taking, and becoming immersed in the entrepreneurs setting.

#### **4.5.3.3 Key Informants Interviews**

Key informant interviews were essential for providing contextual information to support resident and business surveys and, most important, business interviews. These interviews were conducted as a second round of data collection to gain further insight into the resident and business participant survey/interview findings. This strategy of dividing data collection into two phases aligns with a CR methodology, in that the results from phase one are analysed through abduction, and then reinforced through retroduction using supporting data gathered in the second phase. A total of fifteen key informants were interviewed. Such individuals belonged to the public and civic sector. The inclusion of all three sectors (public, private, civic) provided a comprehensive understanding of the tourism climate. Initially, a list of potential interviewees was compiled primarily via internet searches and tangible tourism documents. A second wave of desirable candidates was discovered through word of mouth from members of the community who participated in the business surveys. A final round of interview connections was divulged during interviews with other subjects.

Candidates were largely contacted by email or telephone. If neither of these methods was attainable, the researcher approached the individual in person to request an interview. Each participant was provided a letter that offered details about the research project, outlining their non-obligatory involvement and confidentiality guarantee. Interviews were semi-structured and

consistent for each participant. Similar to the business interviews, an unstructured approach began to emerge. For clarity, the information learned through each session warranted further questions with other candidates. The researcher backtracked for follow-up interviews with those who agreed to comment further. Depending on the interviewee, approximately 8-12<sup>26</sup> open and closed-ended questions were asked, to provide personal information as well as to determine their involvement in tourism. Interviews ranged from 30-90 minutes. Once again, interviews that exceed the allotted time were initiated by the participant. Rapport earned with key informants provided a platform for further dialogue during the time spent in the community.

#### **4.6 Research Analysis**

The overall goal of CR research is to identify causal relationships between event regularities and causal powers, and the generative mechanisms that produce them. This contrasts to interpreting and predicting or understanding the socio-cultural factors and meanings of an event (Wynn and Williams, 2012). In other words,

CR holds that one can rarely (if ever) identify a complete set of precedents which will *always* lead to an outcome because of the possible interaction of mechanisms subsequently enacted by structural entities and contextual factors in an open system. As such, explanation in CR seeks to identify the causes of a particular phenomenon that has occurred. This differs from the ability to make precise predictions, which require that we are able to control or determine the specific conditions affecting the enactment of a given set of mechanisms in order to correctly anticipate a given outcome (Wynn and Williams, 2012, p. 793).

Given this, the critical realist explanatory research model (Table 4.1) is appropriate to guide the research analysis process. According to Danermark et al (2002), this model was adapted to fit CR from the Popper-Hempel deductive explanatory model that “shows how empirical laws can be related to particular events” (p. 109). However, it incorporates elements of Bhaskar’s CR reasoning, and has been adapted and modified by many other critical realists (e.g. Decoteau, 2017; Eastwood et al., 2014; Jessop, 2005; Modell, 2017; Radulescu and Vessey, 2009). The difference, they argue, is that the adaptation is designed as “guidelines for how to relate in research practice the concrete to the abstract and the abstract to the concrete”, which place more emphasis on abduction and retroduction modes of inference than inductive and deductive

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<sup>26</sup> Not all questions pertained to each individual key informant. The number of questions therefore varied.

reasoning (Danermark et al., 2002, p. 109).

To evaluate the empirical level of reality, critical realists draw an abstraction of an open system, which becomes part of the pseudo-closed system. Danermark et al (2002) compare a pseudo-closed system to that of a judicial or health care system, where there is “conscious striving to make society (and nature – nature’s mechanisms are inevitably involved) more controllable in relation to people’s different aims” (p. 68). Relatedly, to do social science research, “theory must necessarily abstract or isolate. Given that theory cannot embrace and describe every facet and causal [power]...much will always be excluded”, and, as a consequence, “some degree of closure is inevitable in any theory” (Hodgson, 2014, p. 128). As such, the abstract represents a pseudo-closed, and the concrete represents an open, system, which separate “two different types of knowledge about reality, both important but not to be confused or reduced to one another” (Danermark et al., 2002, p. 109).

The research analysis was undertaken in several stages, and is outlined below in the critical realist explanatory research model (Table 4.1). To illustrate the concrete-abstract-concrete process, a visual diagram is provided below (Figure 4.3). The first stage is guided by the epistemological meta-theoretical framework of concepts and ideas gathered from Chapter 2 via flexible-deduction.

**Table 4.1** Critical Realist Explanatory Research Model

Stages of research model	Types of knowledge of reality	Method/Mode of inference	Components analysed	To be identified	Chapter
1: Description	Concrete	Descriptive statistics, Content analysis, Coding, Triangulation of data	Extensive data: business surveys, <i>and</i> Intensive data: business interviews, <i>and</i> Secondary data	Context, Structures and Conditions in the geographic space (i.e. Newfoundland)	Five & Six
2: Analytic Resolution	Abstract	Comparative analysis	Context of two case study sites, <i>and</i> <b>Epistemological meta-theoretical framework</b>	Structures and Conditions within each case study site (i.e. Brigus and Trinity Bight)	Seven
3: Abduction/Theoretical redescription	Abstract	Interpret, Redescribe, Reinterpret, <i>and</i> Flexible-deductive coding	Structures and conditions of each case study site <i>and</i> compared to <b>Epistemological meta-theoretical framework</b>	Emergent properties or Demi-regularities	Seven
4: Retroduction	Abstract	Counterfactual thinking	Demi-regularities, <i>and</i> Reintroduce new intensive and extensive data (Resident surveys, Business interviews, Key informant interviews), <i>and</i> <b>Ontological stratification</b>	Causal powers of structures	Eight
5: Comparison between different theories and abstractions ( <b>retroduction continued</b> )	Abstract	Counterfactual thinking	Causal powers of structures, <i>and</i> Reintroduce new literature to expand explanatory power, <i>and</i> <b>Ontological stratification</b>	Generative mechanisms	Eight
6: Concretization and Contextualization	Concrete	Flexible-induction (Adaptive Theory)	Contextualize with concrete studies and other mechanisms that might exist	New theoretical contributions to the literature (although historically/culturally specific & fallible)	Nine

### *Stage 1 Description*

A mix of extensive (quantitative) and intensive (qualitative) methods is recommended for CR research (Eastwood et al., 2014) to determine event demi-regularities (Stage 2). Some survey participants declined to participate in an interview and vice versa. Reasons provided for not

participating include: busy time of year and not interested. Those that participated in an interview only expressed interest in an interview at the time of survey distribution. All rural in-migrants were counterurbanites (i.e. no lateral, rural to rural in-migrants, were identified). Therefore, the terms ‘counterurbanite’ and ‘rural in-migrant’ are used interchangeably when referencing participants of this study.

A total of seven (3 local, 4 counterurbanite) and fourteen (2 local, 12 counterurbanite) business surveys, in Brigus and Trinity Bight, respectively, were collected and analysed quantitatively. Closed-ended questions were tallied and used to calculate descriptive statistics (e.g. average age, frequencies). A total of eight (2 local, 6 counterurbanite) and thirteen (1 local, 12 counterurbanite) business interviews, in Brigus and Trinity Bight, respectively, were transcribed and recorded into manuscripts. Key informant interviews (Brigus, 4; Trinity, 3) were also transcribed and recorded into manuscripts. The researcher listened to the recordings several times to ensure that they were transcribed correctly. Interviews were used to develop general themes that were guided by the research questions and objectives. A code was assigned to each theme to allow for comparing and contrasting. Secondary data (e.g. historical site brochures, government websites) were gathered during the above two processes, as well as during business survey and interview analysis. Triangulation was used to identify emergent properties of various structures within the data to provide the context of both study sites. Wynn and Williams (2012) prefer this since “different structures call for different means of developing knowledge about them and their properties which require the use of different methods and perspectives”, as well as, “to control for the influence of various biases on the research process and the results generated by the process” (p. 803). As such, secondary data was used to fill gaps in primary business survey data, and business interviews were used to fill the gaps in both sets (secondary and business survey) of data. The result is a concrete context in which to begin the abduction and retroduction process.

### *Stage 2 Analytic Resolution*

In the analytical resolution stage “we separate or dissolve the composite and the complex by distinguishing the various components, aspects or dimensions” (Danermark et al., 2002, p. 109-10). Because there are two sites involved in this study, this section compares and contrasts the findings (context) from both communities into an *abstract* of structures and conditions,

which excludes “literally millions” of causal powers (Fleetwood, 2017, p. 44). This process closes the system, but does not exclude alternative possible structures and causal powers entirely (i.e. pseudo-closed). This abstract is presented in the beginning of chapter seven, and is also carried out during Stage 3 through abduction.

### *Stage 3 Abstraction/Theoretical Redescription*

In Stage 3, an abstract of structures and their conditions, from the pseudo-closed system, are interpreted and redescribed using the epistemological meta-theoretical framework. This framework was designed to create the context that guides this study using extant literature (Chapter 2). Abduction is also referred to as “inference to the best explanation...Abduction differs from induction and deduction in that abduction involves an inference in which the conclusion is a hypothesis that can then be tested with a modified or new research design” [i.e. ontological stratification] (Ignatow and Mihalcea, 2016, p. 26). This stage involved a dialectical movement between the empirical data (abstracted structures and their conditions) and epistemological meta-theoretical framework (e.g. rural change, counterurbanization, cultural heritage tourism) in an attempt to identify causal patterns (Bergene, 2007). The outcome is an abstract of event demi-regularities that are identified through emergent properties in the abductive process, which are used in the next phase of the explanatory model.

### *Stage 4 & 5 Retroduction & Comparison between different Theories and Abstractions*

Retroduction is employed in Chapter 8. It entails retroduction (moving back and forth) of abstract demi-regularities and through ontological stratification. This framework is stratified in that it avoids the simplistic reductionism of Stage 3. Rather, it uses ontological stratification of the event demi-regularities (*empirical* experiences) to explore the identified structures’ causal powers (*actual* events) and the mechanisms (*real* mechanisms) that manifest to produce the phenomenon. In other words, retroduction questions “what must be true in order to make this event possible?” (Easton, 2010, p. 123). This involves moving back and forth between the transitive (“theories, concepts and discourse or research”) and intransitive (“enduring structures and properties of objects that enable and constrain human agency”) domains (Botterill, 2007, p. 122), in search of the best (but fallible) explanation of observed phenomenon. To achieve this, new extensive (resident surveys) and intensive (key informant interviews, business interviews)

data are introduced to provide further explanatory power. Seasonal resident surveys (Brigus, 19; Trinity, 20) are omitted from analysis to provide an accurate account of permanent residents' attitudes, perceptions, and experiences of tourism. Closed-ended resident survey (Brigus, 71; Trinity, 12) questions were tallied and used to calculate descriptive statistics (e.g. average age, frequencies). Key informant interviews (17) were transcribed and recorded into manuscripts. The researcher listened to the recordings several times to ensure that they were transcribed correctly. New data exposed more "enduring structures and properties of objects that enable and constrain human agency" (Botterill, 2007, p. 122); providing new insight into event demi-regularities and their causal powers.

The next step of this process (Stage 5) involves counterfactual thinking:

Counterfactual thinking is fundamental for all retrodiction. We ask questions like: How would this be if not ... ? Could one imagine X without ... ? Could one imagine X including this, without X then becoming something different? In counterfactual thinking we use our stored experience and knowledge of social reality, as well as our ability to abstract and to think about what is not, but what might be (Danermark et al., 2002, p. 101).

As per ontological stratification, this process "embodies particular assumptions about the nature of the natural and social worlds", while, at the same time, builds on "important insights from differing paradigms" (Mingers, 2006, p. 12). As such, counterfactual thinking then asks: what conditions must be present to activate a structure's causal powers, which, in turn, manifests the generative mechanism that produces them?

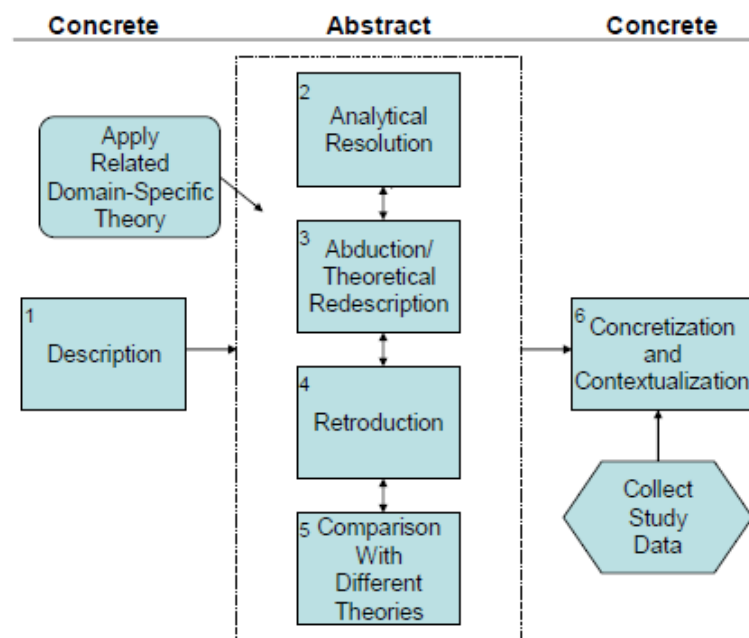
#### *Stage 6 Concretization and Contextualization*

The final stage requires the researcher to assess how the identified structures, causal powers, and mechanisms can be incorporated into practice. In other words, concretization "involves examining how different structures and mechanisms manifest themselves in concrete situations" (Danermark et al., 2002, p. 110). According to Radulescu and Vessey (2009), at this stage the researcher "should seek to: 1) to interpret the meanings of the mechanisms as they appear in a specific context; and 2) to offer explanations of manifested events" (p. 6). Or, as Danermark et al (2002) propose, it is here that mechanisms are interpreted in particular contexts and given explanation as to how they can be situated in "concrete events and processes" (p. 111). Now, to do this is somewhat problematic to CR in the sense that social structures are part of open systems. Therefore, a flexible-inductive approach *assists* the final stage of this research. This is



based on Layder's (1998) Adaptive Theory, which "employs both deductive and inductive procedures—although the exact blend will depend on the circumstances—in order to formulate theory" (p. 134). An adaptive theory approach "has to be understood as an attempt to combine what may on the surface be regarded as 'incompatible' premises or underlying assumptions. Adaptive theory tries to steer clear of this incompatibility by avoiding extreme, rigid or dogmatic definitions of induction and deduction and by conceiving of them as potentially 'open' discourses" (Layder, 1998, p. 135). As such, it is here that the structures, causal powers, and generative mechanisms are accredited for their implications in current research, and what theoretical contributions can be established based on this statement. Important to be aware of, however, is that final assumptions are not intended as definitive answers or predictable outcomes, rather fallible theories that can only bring us closer to the truth.

Illustrated in Figure 4.3, the concrete level of knowledge represents the theories and concepts used to guide this research (Stage 1) and to help contextualize the generative mechanisms identified from this study (Stage 6). The abstract represents the level of knowledge that exists in a pseudo-closed system, which is used in the abduction and retrodution processes (Stages 2-5).



**Figure 4.3** Visual of Critical Realist Explanatory Research Model

Source: Radulescu and Vessey (2009, p. 6), adapted from Danermark et al (2002)

#### **4.7 Ethical Considerations and Researcher Bias**

This study received full ethics approval from the University of Waterloo prior to the research commencement. No ethical problems were anticipated because investigative tools were not physiological or psychologically-harmful. All but one participant granted the researcher permission to disclose their real identity. However, due to the small size of each community and thus possible conflict that could arise as a result of disclosing sensitive information, all business owner/operator participants remained anonymous through the use of pseudonyms (their webpages are marked anonymous). Only in times where key informant participants (from outside of both communities) granted the researcher permission, were names used in this thesis. All ethical considerations were adhered to as outlined by the University of Waterloo, Office of Research Ethics.

The researcher aimed to limit bias in a number of ways. The notion of a stratified ontology separates the empirical from the actual and the real. This means that explanations are not derived directly from empirical data, but from questions of what must reality be like for these event regularities to occur. A stratified ontology reduces bias by not interpreting results directly from the empirical data, but rather seeking causation through abduction and retroduction (Eastwood et al., 2014; Tsang, 2016). However, this does not eliminate researcher bias, as our understanding of the empirical realm remains somewhat subjective. To overcome some possible researcher bias, this study included two research sites to add validation to results based on increasing the number of times they are identified (i.e. same study at two locations). For example, if similar causal powers are determined to be activated under similar conditions at both study sites, it reduces researcher bias by increasing the number of times they are observed. Also, increasing the number of data sources, and triangulating the results, helps to reduce researcher bias (Modell et al., 2007). For instance, using quantitative surveys helped the researcher gain insight into business owners' perceptions of tourism that may otherwise be compromised in an intimate researcher-participant setting.

Another benefit of CR that reduces bias is that the researcher recognizes all theories are value-laden and fallible; albeit, some are more fallible than others (Kempster and Parry, 2014). Therefore, the researcher does not limit the available knowledge that can be used in a particular study, which could otherwise direct and shape a researcher's approach and methods used to attain desired results. Likewise, CR does not attempt to control the variable in a study by

completely closing the social system under investigation. Closing a social system completely, “can be an occasion for opportunistic behaviour by researchers who are intent on verification”, and thus “Researchers seeking to verify their theories can search for specifications that produce theory-supporting results” (Miller and Tsang, 2011, p. 142). In this research, investigations occurred in pseudo-closed systems, which enabled the researcher to introduce new theories and empirical data for further justification and explanatory power (i.e. concrete-abstract-concrete).

## **4.8 Study Sites**

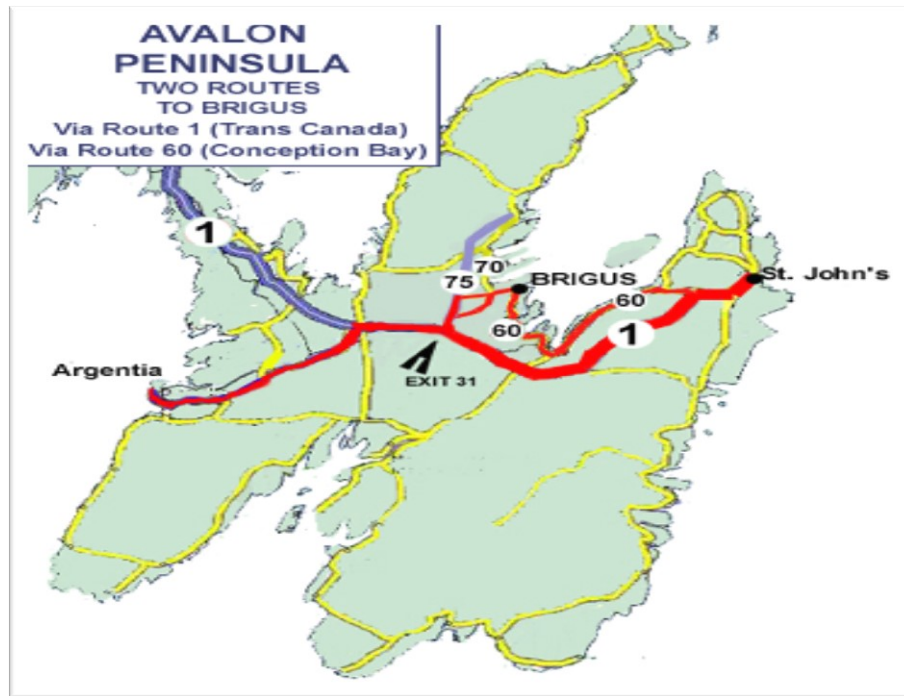
Two study sites are chosen to identify similarities and differences of structures and conditions in two locations within the same geographic space (i.e. Newfoundland). Both locations are chosen based on their popularity as established tourism destinations, and considering the practicality of travelling to these locations under time restrictions (i.e. short summer season). The following sections examine the communities of Brigus and Trinity (Trinity Bight).

### **4.8.1 Brigus**

The town of Brigus is located approximately 80 kilometres west of the provincial capital, St. John’s, and is situated near the major TCH on route 60 in Conception Bay<sup>27</sup>. Figure 4.4 illustrates the location of Brigus in comparison to St. John’s. Figure 4.5 is a photo of the town of Brigus.

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<sup>27</sup> Although the name ‘Brigus’ has an unknown origin, it may have been named after either ‘Brickhouse’ or ‘Brighthouse’ in Yorkshire, England or, inspired from the French word ‘Brigue’ meaning ‘to intrigue’ (Memorial University of Newfoundland—Digital Archives, n.d). Conception bay is located between St. John’s and Brigus.



**Figure 4.4** Map of Brigus as located on the Avalon Peninsula, Newfoundland and Labrador

Source: Town of Brigus (2006b)



**Figure 4.5** Town of Brigus, Newfoundland and Labrador

Source: Chafe (2009)

Prior to the cod moratorium, Brigus was home to more than 1,000 residents (Letto, 2010). Over the years, the resident base has decreased more than twenty percent. According to the 2016 Canadian Census, Brigus has a population of 723 people, down 3.6 percent from 750 in the 2011 census (Statistics Canada, 2016a). However, this does not include seasonal residents who occupy approximately 129 of the roughly 446 private dwellings in the community (Statistics Canada, 2016a). Table 4.2 illustrates population change (and percentage change) in Brigus from pre-moratorium (1991) to its current population (2016 statistics). Also, Brigus populations are compared to provincial populations.

**Table 4.2** Brigus Population Change by Year

Census Year	Population	Percentage change	Population of Newfoundland and Labrador
1991	929	n/a	568, 474
1996	902	-2.9	552, 156
2001	784	-13.1	512, 930
2006	794	1.2	505, 469
2011	750	-5.5	514, 536
2016	723	-3.6	519, 716
1991-2016	-206	-22.2	-8.6

Source: Compiled from Statistics Canada (1991<sup>28</sup>, 1996, 2001<sup>29</sup>, 2006<sup>30</sup>, 2011<sup>31</sup>, 2016), City Population, Canada, Newfoundland and Labrador (2017<sup>32</sup>)

Settlement began in 1612, when a resident of nearby Cupids (founded in 1610), sold half of the harbour to a prominent local family (Letto, 2010). Population grew slowly, with only 34 people reported in the 1675 census, increasing in 1775 with immigrants from Ireland, England and Whales (Letto, 2010). By 1839, the number of people residing in the town peaked at 2000 (Canada's Historic Places, 2017a). These individuals were largely sustained by seal hunting and fishing, along with the raising of cattle and pigs (Letto, 2010). The town was once considered the most prosperous community in Conception Bay, and by the mid- 19<sup>th</sup> century, it became a leader

<sup>28</sup> Newfoundland and Labrador Statistics Agency (1991&1996)

[http://www.stats.gov.nl.ca/statistics/Census1996/PDF/1996\\_Pop\\_NL\\_Alpha.PDF](http://www.stats.gov.nl.ca/statistics/Census1996/PDF/1996_Pop_NL_Alpha.PDF)

<sup>29</sup>Statistics Canada (2001)

<http://www12.statcan.ca/English/profil01/CP01/Details/Page.cfm?Lang=E&Geo1=CSD&Code1=1001446&Geo2=PR&Code2=10&Data=Count&SearchText=Brigus&SearchType=Begins&SearchPR=01&B1=Population&Custom=>

<sup>30</sup> Newfoundland and Labrador Statistics Agency (2006)

[http://www.stats.gov.nl.ca/statistics/census2006/PDF/POP\\_CSD\\_Alphabetical\\_2006.pdf](http://www.stats.gov.nl.ca/statistics/census2006/PDF/POP_CSD_Alphabetical_2006.pdf)

<sup>31</sup> Statistics Canada (2011, 2016) <http://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-csd-eng.cfm?LANG=Eng&GK=CSD&GC=1001446>

<sup>32</sup> <http://www.citypopulation.de/Canada-Newfoundland.html>

in extractive marine industries (seal hunting, and fishing). Home to several of the island's richest people, it was soon recognized as one of the "money centres of the island" (Letto, 2010, p. 2). Large fish stores, processing plants and spin-off businesses were plentiful, giving rise to a prosperous community (Maritime History Archive, 2012).

Brigus was once considered one of the busiest ports in Newfoundland (Town of Brigus, 2017b). However, the population was on a steady decline in the late 1980s and early 1990s, escalating after the 1992 cod moratorium. The closure of fish plants and spin-off activities further displaced local workers and lowered the population base (ERA Architects, 2013). Brigus, like most rural outposts, was forced to diversify their weakening economy (The Compass, 2012). The collapse of the cod fishery sparked unprecedented financial support from the federal and provincial governments. Tourism was seen as a viable industry to lessen the impact of a declining economy (Higgins, 2012). In the years that followed the cod moratorium, Brigus, "like many outpost communities, lost its economic base" (ERA Architects, 2013), and "tourism had replaced the fishery as the economic base in some rural communities" (Higgins, 2012).

Today, the town of Brigus is referred to as a "historic gem" (Newfoundland and Labrador Tourism, 2017e) that "stands at the forefront of Newfoundland's heritage settlements" (Memorial University, 2011). It is described as having a "picture postcard...stunningly beautiful harbour" (Newfoundland and Labrador Tourism, 2017e), being "purer, less contaminated culturally and environmentally than St. John's", and having "iconic power" as it is the birthplace of the famous Arctic explorer Bob Bartlett (Lerena, 2015, p. 29). The town website recommends "you walk through our shaded, winding, ancient streets, take a step back in time and be reminded of an era long past, but not lost in our beautiful town" (Town of Brigus, 2006c). It also promotes their annual Brigus Blueberry Festival, which attracts over 12,000 tourists each year, to "come to enjoy three days of music, traditional food, dancing, fireworks, and, of course, blueberries" (Newfoundland and Labrador Tourism, 2017b).

Several provincially registered heritage homes and buildings are found in the Historical Zone of Brigus. Some of these include the Hawthorne Cottage, Landfall Cottage, Stone Barn, St. George's Anglican Church and Joseph Bartlett House (Canada's Historic Places, 2017a)<sup>33</sup>. These

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<sup>33</sup> There are a number of houses located in the heritage district that have permits requesting modifications (i.e. upgrades, construction, additions) to the structure. Because it is a heritage district, properties must abide by their original and traditional design (CBCL Ltd., 2013).

buildings display a variety of structural designs, ranging from Newfoundland ‘saltbox’ style (Canada’s Historic Places, 2017a), and churches that present as Gothic Revival architecture (Heritage Newfoundland and Labrador, 2016b). Figure 4.6 illustrates a saltbox home in Brigus. Following, Figure 4.7 is a photo of St. George’s Church in Brigus that illustrates the Gothic Revival architecture. Figure 4.8 is also the Gothic Revival style found in Brigus.



**Figure 4.6** Brigus Original Saltbox Style Home

Source: Meghan Shannon (2012)





**Figure 4.7** Brigus Modern Saltbox Style Home

Source: Meghan Shannon (2012)



**Figure 4.8** Gothic Revival Architecture Style of St. George's Church

Source: Heritage Newfoundland and Labrador (2016b)

A common feature on houses in the Historical Zone is the “Brigus Porch, characterized by a distinctive rounded roof and glazed doors and sides” (Canada’s Historic Places, 2017b). The



presence of these structures has contributed to the town's tourist development. Because of the rich cultural heritage value, and popularity of Brigus as a tourism spot, it is included in this study. The next section examines the second study site: Trinity/Trinity Bight.

#### 4.8.2 Trinity Bight

Trinity Bight is located along the east side of the Bonavista Peninsula, approximately 269 kilometres from St. John's (Government of Newfoundland and Labrador, n.d). A trip from the provincial capital to Trinity Bight takes an average of three and a half hours by car. Beginning at the base of the peninsula, the coastal terrain can be a challenging drive compared to the island's major Route 1 of the TCH (Researcher's notes). Illustrated below (Figure 4.9) is a map of the Bonavista Peninsula and the Trinity Bight region that consists of 12 communities<sup>34</sup>. The map also illustrates Bonavista Bay and Trinity Bay.



**Figure 4.9** Map of Bonavista Peninsula Trinity Bight

Source: Action Committee for Tourism Inc., Town of Bonavista (2013)

<sup>34</sup> Not all twelve communities are listed on the map. Those that are listed include: New Bonaventure, Old Bonaventure, Trouty, Trinity, Trinity East, and Port Rexton.

Each year, the region draws tens of thousands<sup>35</sup> of visitors because of its historical, cultural, and scenic significance (Roy, 2017). Geographically, the term ‘Bight’ is used to describe the area’s coastal indentation and alcove features (Trinity Bight, 2010). The recessed shoreline consists of twelve small communities including, from north to south: English Harbour, Champney's East, Champney's Arm, Champney's West, Trinity East, Port Rexton, Trinity, Goose Cove, Dunfield, Trouty, Old Bonaventure, and New Bonaventure (Trinity Bight, 2010). These communities are amongst some of the oldest settlements in North America, dating back to the early 16<sup>th</sup> century (Gilbert, 2011). The cultural heritage significance can be illustrated in the restoration and preservation efforts of colonial structures and landscapes (Trinity Bight, 2010). Furthermore, Trinity Bight boasts three out of twelve designated provincial sites, namely, Hiscock House, Trinity Visitor Centre, and the Mercantile Building (Newfoundland and Labrador Tourism, 2017f). Other noteworthy landmarks and activities in Trinity Bight include whale and boat tours, ecclesiastical archives, theatre, watersport, museums, tourist shops and cafés, and historical tours (Researcher’s notes).

Some say that “Of all Newfoundland’s heritage communities, Trinity perhaps defines us best” (Trinity Bight, 2010). The community of Trinity is one of the top destinations according to the Government of Newfoundland and Labrador’s “Places To Go” (Newfoundland and Labrador Tourism, 2017a). All three of the Trinity Bight region’s heritage sites are located in the town of Trinity (Newfoundland and Labrador Tourism, 2017c). The community is home to the award winning Rising Tide Theatre, which established one of the provinces most popular performances: *New Founde Lande Trinity Pageant* (Rising Tide Theatre, 2017). The performance uses a true historical and political narrative of Trinity to guide visitors on a walk through the past (Rising Tide Theatre, 2017). The Trinity theatre is marketed as *Seasons in the Bight*, which gave rise to the region’s designation of “Trinity Bight” and their strong regional destination status (Rising Tide Theatre, 2017; Researcher’s notes). Trinity’s rich history provides a springboard for cultural heritage re-enactments. The cultural and heritage markers of Trinity play a significant factor in attracting more visitors than any other community in the Bight region (Researcher’s notes).

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<sup>35</sup> Tourism in the Trinity Bight region is growing. For example, in 2011, the number of tourists visiting the local hiking trail (Skerwink Trail) was 11,000. In 2017, the number of visitors grew to approximately 32,000 (Roy, 2017).

### 4.8.3 Trinity

According to Ulysses Travel Guides (2003), explorer Gaspar Corte Real named the Bonavista Peninsula, and “explored its bay on Trinity Sunday in the year 1501” (p. 74). In 1558, “the English made Trinity their first permanent settlement in Newfoundland” (Ulysses Travel Guides, 2003, p. 74). The geographic location of the community in the North Atlantic was favourable to European migratory fishermen. The town website confirms this, stating its “defensible harbour, with abundant room for the ships of the day and shores well suited for outbuildngs, wharves and fish-flakes, made it ideal for the early migratory fishery” (Town of Trinity, 2017b). Figure 4.10 is a photo of the town of Trinity.



**Figure 4.10** Town of Trinity, Newfoundland and Labrador

Source: Trinity Historical Society (2014f)

Trinity’s harbour had such value that it was one of the only locations deemed worthy enough for the Crown to take on the expenses of establishing a secured fort (Pitt, 2012). Today, the fort is visible (accessible only by foot) in Trinity, marked by their iconic lighthouse. Further, in 1615, Trinity became home to the first court of justice in North America. Despite periodic threats from the French, Trinity continuously grew into a major fortified trading and fishing hub (Pitt, 2012).

Many sources suggest that the majority of people living in Trinity were of English descent; primarily migrants from Poole, England (Pitt, 2012; Trinity Historical Society, 2014a). By 1720, the town of Trinity had established local magistrates and the first church was built by 1730 (Pitt, 2012). St. Paul's Anglican Church is shown in Figure 4.11. It also resembles Gothic Revival style Architecture (Heritage Newfoundland and Labrador, 2016c). It is worth noting that by the 1800s, Trinity was one of the few island communities to have an established clergy and community surgeon (Pitt, 2012). Dr. John Clinch, Trinity's Anglican Priest, has been recognized as the first North American to successfully vaccinate against smallpox (McIntyre and Houston, 1999). A plaque was dedicated to Dr. Clinch years after his death in 1819, and is registered as a National Historic Monument (CBC, 2010).



**Figure 4.11** St. Paul's Anglican Church, Trinity Newfoundland and Labrador

Source: Meghan Shannon (2012)

In 1869, the population of Trinity peaked at about 800 people (Town of Trinity, 2017b). The number of people living in the community increased during the milder months due to an estimated 200-300 seasonal fishermen (Town of Trinity, 2017b). It is no surprise, however, that, like Brigus, Trinity experienced rapid population decline, as a result of an aging population and a steep decline in employment opportunities (leading to steady out-migration and stagnating birth

rates) (Higgins, 2008b). The decade following the 1992 ban on cod fishing had the highest rates of rural out-migration the province had ever experienced. From 1991-2006, out-migration, compounded with stagnant birth rates and low numbers of incoming immigrants, contributed to a nearly 50 percent decline in Trinity residents (CBCL Ltd., 2012). Interestingly, according to the 2016 census, the population of Trinity (Statistics Canada, 2016c) and Port Rexton (Statistics Canada, 2016b) has increased by 23.4 and 0.6 percent, respectively, from 2011. Table 4.3 illustrates population change (and percentage change) in Trinity, as well as the increasingly popular Trinity Bight community, Port Rexton. Trinity populations are also compared to provincial populations.

**Table 4.3** Trinity and Port Rexton Population Change by Year

Census Year	Trinity Population	Percentage Change	Port Rexton Population	Percentage Change	Population of Newfoundland and Labrador
1991	326	n/a	495	n/a	568, 474
1996	277	-15.0	439	-11.3	552, 156
2001	240	-13.4	432	-1.6	512, 930
2006	191	-20.4	351	-18.8	505, 469
2011	137	-28.3	338	-3.7	514, 536
2016	169	23.4	340	0.6	519, 716
1991-2016	-159	-48.2	-155	-31.3	-8.6

Source: Compiled from Statistics Canada (1991, 1996, 2001, 2006, 2011, 2016<sup>36</sup>)

Although fishing remains a source of income for some, tourism has surpassed as the primary economic driver in the region. The community is widely known for its nostalgic presence and feeling of “living in the past” (TripAdvisor, peterp\_knobel, 2017a). Some suggest that a visit to Trinity is like “going back in time” (TripAdvisor, Pete H, 2016), and over the years the small community has earned the reputation for being a “staged town” with “actors” because it looks untouched and far from modernized (Researcher’s notes).

The development of Trinity (Trinity Bight) as a primary destination for tourists has fueled business development and attracted outside investments (CBCL Ltd., 2012). The community of Trinity hosts the majority of businesses in the Trinity Bight region. For this

<sup>36</sup>Statistics Canada (2011, 2016; Trinity) [http://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CSD&Code1=1007015&Geo2=PR&Code2=60&Data=Count&SearchText=Trinity%20\[Trinity%20Bay\]&SearchType=Begin&SearchPR=01&B1=All&GeoLevel=PR&GeoCode=1007015&TABID=1](http://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CSD&Code1=1007015&Geo2=PR&Code2=60&Data=Count&SearchText=Trinity%20[Trinity%20Bay]&SearchType=Begin&SearchPR=01&B1=All&GeoLevel=PR&GeoCode=1007015&TABID=1) Statistics Canada (2011, 2016; Port Rexton) <http://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CSD&Code1=1007016&Geo2=PR&Code2=60&Data=Count&SearchText=Port%20Rexton&SearchType=Begin&SearchPR=01&B1=All&GeoLevel=PR&GeoCode=1007016&TABID=1>

reason, Trinity served as a focal point. Nevertheless, community boundaries are often blurred to those who visit the area. In addition, the distance between Trinity Bight's communities is less than 20 kilometres in either direction; the majority found within a 10 kilometre radius (Researcher's notes). With the exception of a few businesses, most research was conducted in Trinity. It is apparent that Trinity Bight, and Trinity in particular, has been successful in the development of their tourism industry. For this reason, Trinity Bight is chosen as a desirable region to conduct such as study.

#### **4.9 Conclusion**

In closing, this research takes a critical realism approach to comparative case research. This involves comparative analysis of two study sites through the critical realist explanatory research model. A mixed method design uses quantitative and qualitative tools to conduct this research, which consists of secondary sources, surveys, and interviews. Participants include business owners, local residents, and key informants from the public, private, and civic sectors. Research analysis involves abduction and retroduction modes of inference. Two study sites, Brigus and Trinity Bight, are chosen to conduct this research (with emphasis on the town of Trinity). Their economic and social history, as well as their cultural and heritage attributes, rendered them prime candidates for tourism research. The empirical results of this investigation are presented in Chapters 5 and 6.

## **5 Brigus**

### **5.1 Introduction**

Chapter 5 presents the research findings for Brigus, organized by the study's three objectives. The first section establishes the region's cultural heritage tourism trajectory, by describing the importance of various sectors (public, civic, private) and demographic groups (locals, non-profit, counterurbanites)<sup>37</sup>. The second section uncovers local resident and counterurbanite motivations for opening tourism-related firms. The final section, in three parts, considers if in-migrants are contributing to neo-endogenous development.

### **5.2 Development of the Cultural Heritage Tourism Trajectory in Brigus**

This section describes the development of Brigus' cultural heritage tourism trajectory. To accomplish this, contributions from the public, civic and private sectors are explored, with the latter divided into local resident (private and non-profit) and counterurbanite (private and non-profit) groups, to reflect proprietor's business type, and residential history. Table 5.1 illustrates the stage at which these participants engaged in tourism development, the nature of their involvement (e.g. accommodation), their receipt of government funding, and, the development process employed. Each of these is described below, with the exception of the latter, which is considered in a later section.

This study confirmed that Brigus is a cultural heritage tourism community. As a result of post-moratorium economic decline, the community began to capitalize on its rich history, and "Today, Brigus is a 'tourism' town" (CBCL Ltd., 2013, p. 8). The Town Clerk confirmed that tourism offered alternative options of employment and income, as the one remaining fish plant was the only other source of jobs. He also shared that in the mid-1980s, rural outposts of Newfoundland were differentiating themselves from "things that made them viable outside of the fishery" (personal communication, 2012). Brigus quickly developed a reputation as a cultural heritage community, because of its famous historic residents, such as Captain Bob Bartlett (Town Clerk, personal communication, 2012). Bartlett's home, Hawthorne Cottage, was the first

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<sup>37</sup> Pseudonyms are used for business owner/operator participants.



modern day tourism attraction in Brigus, established as a National Historic Site in 1978<sup>38</sup> (Canada's Historic Places, 2017a). The natural landscape is also an attractive feature that draws tourists to the area. The Town Clerk described the natural environment as something “God gave to us in the way our streets, our roads, hills [and] scenery; it just became an attraction in itself without having to do anything” (personal communication, 2012). Accordingly, the town of Brigus utilized its historic charm and natural landscape to market itself as a tourism destination.

**Table 5.1** Chronological Dates of Tourism Development in Brigus

Date	Venture by North American Sector	Industry Classification System (NAICS) <sup>39</sup>	Funding/Financial aid	Process
(-1992)	<b>Pre-Moratorium</b>			
1986	Accommodations (721191)	Private	No	Recombination
1986	Non-profit Organizations (813410)	Civic	Yes	Recombination
1987	Museums (71211)	Civic	Yes (and local fundraising)	Recombination
1988	Non-profit Organizations (813410)	Civic	Yes	Recombination
1988	Entertainment (512130)	Civic	Yes (and local fundraising)	Recombination
1991/1996 <sup>40</sup>	Food Services (722511)	Private	Yes	Recombination
(1992)	<b>Post-Moratorium</b>			
1993	Food Services (722511)	Private	Yes* <sup>41</sup>	Recombination/Conversion
1996	Entertainment (71111)	Civic	Yes	Recombination
1997	Accommodations (721191)	Private	No	Recombination
2002	Accommodations (721211)	Private	No	Recombination
2003	Entertainment (713990)	Private	No	Recombination
2003	Nature Parks (712190)	Civic	Yes (and local fundraising)	Recombination
2004	Heritage Sites (71212)	Civic	Yes (and local fundraising)	Recombination
2004	Non-profit Organizations (813410)	Civic	Yes (and local fundraising)	Recombination
2005	Heritage Sites (71212)	Private	Charity	Recombination
2007	Accommodations (721191)	Private	No	Recombination/Layering
2008	Nature Parks (712190)	Civic	Yes (and local fundraising)	Recombination
2012	Accommodations (721211)	Private	No	Layering

<sup>38</sup> Hawthorne Cottage, along with approximately 3, 500 artifacts, were given to Parks Canada in 1987 (The Virtual Museum of Canada, 2017b).

<sup>39</sup> Statistics Canada. (2017). <https://www.statcan.gc.ca/eng/subjects/standard/naics/2017/index>

<sup>40</sup> Food service venue first opened in 1991 and was bought by its current owner (study participant) in 1996.

<sup>41</sup> \*Indicates student summer employment grants only.



Early tourism development began with the local public sector, stemming from their desire to revitalize their declining community. For example, records suggest that Town Council became aware of Brigus' visitor appeal long before tourism development. A number of studies were conducted on the historical attributes of the community. Some of these studies include: a) *Brigus Townscape Study* (1971)<sup>42</sup>; b) *What's so special about Brigus? A Townscape Conservation and Community Development Study* (1986)<sup>43</sup>; and c) *Brigus Development Study* (1990)<sup>44</sup>. According to the Town Clerk, these findings were influential in determining how the town could "use heritage and give it a historic taste" (personal communication, 2012). He also shared that the reports helped formulate a "Municipal Town [Plan]", and how to make a "Heritage District part of Brigus" (personal communication, 2012). The Municipal Plan prepared for the town of Brigus "sets out the policies for the management of growth and development in the community" (CBCL Ltd., 2013, p.1). The plan also "aims to protect the historic character and built form of Brigus' townscape" (CBCL Ltd., 2013, p. 1).

The Town Clerk explained that "one of the first things that we did was put up street signs, but touristy looking ones" (personal communication, 2012). Other strategies include the preservation of the Heritage District/Zone, along with many Heritage Sites and structures (Table 5.2). The establishment of a Heritage District/Zone safeguards existing historic structures and places stipulations on new construction. This is described further,

In order to build or fix or do anything to your property, you are restricted to some very strict guidelines. Mostly the outside structure, it had to look pre-Confederation or before 1949. It was hard at first, but now, doing this, it has paid off because by preserving the look, the prices of the houses has increased tenfold. People come here and say, oh my, look at the old buildings. Like the Town Hall, that building was built in 2002, it is not an old building it is built to look like the older building style (Brigus Town Clerk, personal communication, 2012).

However, the community's buildings are not 100 percent authentic, as doing so would be too difficult. For example, traditional windows were wooden, which were later replaced with vinyl (Town Clerk, personal communication, 2012).

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<sup>42</sup> Project Planning Associates. (1971). *Brigus Townscape Study*. St. John's, Toronto & London.

<sup>43</sup> Frederick Hann Associates Ltd. Landscape Architects – Resource Planners; Atlantic Consulting Economists Ltd. (1986). *What's so Special about Brigus? A Townscape Conservation and Community Development Study*. Prepared for the Brigus Historical and Conservation Society.

<sup>44</sup> International Management Services Group Inc.; Frederick Hann and Associates Ltd.; Architecture & Design Incorporated - Pratt, Henley, Blackwood; Elliott and Elliott Ltd. (1990). *Brigus Development Study*. Prepared for the Town of Brigus.

**Table 5.2** Municipal Heritage Actions and Provincial/National Designations

Year	Designation
1978	Hawthorne Cottage designated (NHS) and restored (Parks Can.)
1986	Brigus Stone Barn designated (RHS)
1988	Landfall and Fowler House designated (RHS)
1990	Bartlett/Burke House (RHS)
1992	<b>Post-Moratorium</b>
1994	Brigus downtown designated MHZ on advice of BHCS <sup>45</sup>
1995	Hawthorne Cottage opened to public
1996	Hearn House designated (RHS)
1998	The Joseph Bartlett House designated (RHS)
2003	Wilcox Gardens (CPP)
2004	St. George Anglican Church designated (RHS)
2007	Lakeview designated (RHS)

Notes; these designations include the following: NHS: National Historic Site; MHZ: Municipal Heritage Zone; RHS: Registered (provincial) Heritage Structure; CPP: Canadian Peace Park.

<http://www.historicplaces.ca/en/rep-reg/place-lieu.aspx?id=5455>; <http://www.brigus.net/Tourist/Historic-Attractions-and-Museums.html#a> <https://www.pressreader.com/canada/now-magazine/20040923/281994671108301>

Initial development was also driven by local residents, some of whom formed civic groups. For example, in 1986, the Brigus Historical & Conservation Society (BHCS) was founded by a group of local residents, “who saw a need for it” (BHCS president, personal communication, 2012). The BHCS is a Canadian Registered Charity, run entirely by volunteers. Their responsibilities include operating and funding local historic sites, and securing financial support from the provincial and federal governments for summer student employment (Brigus Historical & Conservation Society, 2017). The BHCS also played a role in the preservation of many other historic structures, which facilitated their eventual designation (Table 5.2). According to the President of the BHCS, the organization had 38 members as of 2012 (personal communication, 2012).

Around the same time (1988), the Brigus Development Association (BDA) was formed. It too, evolved, as local people “had interest in the town, because it was starting to look run down” (Bree, personal communication, 2012). At inception, the BDA was comprised of roughly eight to ten people who were “trying to figure out how to get people into the town to spend money” (Bree, personal communication, 2012). One of their identified strategies was to host an annual Blueberry Festival.

<sup>45</sup> Included in Canadian History Register in 2006.

According to the Mayor of Brigus, the development of the Blueberry Festival put the town “on the map”, and marked a time when locals really began to see the potential for tourism (personal communication, 2012). What is more, he explained that “in the spring of 1991, they called a public meeting, the Brigus Development Association, and said, guys, this festival is getting to be too big, they didn’t have the resources and they didn’t have a lot of knowhow” (personal communication, 2012). Regardless of knowledge or experience, the BDA held another meeting to formulate ways to improve the festival. This was, in part, because “back then, there was a lot of community spirit. Even more than now”; community members were willing to put in the effort to make it succeed (Mayor of Brigus, personal communication, 2012). The Mayor explained the early days of the Brigus Blueberry Festival as follows,

All of the sudden we realized that this isn’t just for the people of Brigus, it is a tourist event. I spoke to a man from British Columbia last year. People from the Unites States, and from Ontario. Friends had visited, stumbled in, word of mouth, because back then there wasn’t a whole lot of money to spend on advertising and promotion. So we had to build on it. I remember saying we need to start spending money on advertising. The committee said well we already get so many minutes from the radio station, and I said we have to spend more money on that. We have to get the word out, so we started doing things differently. If I remember, in 1990, there was no admission to the festival, so to generate money we had to charge an admission. We had to generate money so we could promote this. We were basically promoting the town of Brigus. And the festival, by dragging people in here, we were showcasing the town (personal communication, 2012).

Others confirmed that the Blueberry Festival is “where [tourism] all started” (Town Clerk, personal communication, 2012). Around the same time, the BDA, along with the BHCS, began to fundraise to convert, restore, or designate, local heritage structures. For example, the Stone Barn is a 19<sup>th</sup> century home, which became “one of the most important landmarks in Brigus” (Newfoundland and Labrador Heritage, 2016d). It was designated a Registered Heritage Structure in 1986 (Heritage Newfoundland and Labrador Heritage, 2016d). The Stone Barn was purchased by the BHCS in 1987. From 1987 to 1991, the BHCS renovated the dilapidated barn and renamed it Ye Olde Stone Barn Museum (Heritage Newfoundland and Labrador, 2016d).

The public sector also played a role during this time. In 1988, for example, the Heritage Foundation of Newfoundland and Labrador designated Kent Cottage a Provincial Heritage Structure. Kent Cottage is a 19<sup>th</sup> century structure that has been occupied by many prominent

local figures. Throughout the 20<sup>th</sup> century, the building housed several famous artists and writers, and continues to do so today (The Landfall Trust, 2017).

These civic and public sector initiatives spurred private sector investment. In 1986, the first tourism-related accommodation opened. Claire, a local resident, decided to rent out part of her home as a B&B. She shared that, with the help of her husband, “we built an apartment on our house. That was when the B&B industry had just started so we decide to renovate and get into the business” (personal communication, 2012). Five years later, in 1991, Harold Barrett, a member of the Newfoundland House of Assembly (1979-1989), opened a small café in Brigus (Newfoundland House of Assembly, 1992). Throughout his term, Barrett served as the Minister of Development and Tourism, and Minister of Finance (CBC, 2003). Barrett secured funding for the café from the Atlantic Canada Opportunity Agency (ACOA) (Crystal, personal communication, 2012). Crystal, a local resident and current owner of the café, shared that she was originally hired as a waitress; five years later, in 1996, she took over the business (personal communication, 2012). Her café marked the last business to open before the economic disaster of 1992.

The trajectory continued to evolve after the cod moratorium. Shortly after the ban on cod fishing, a counterurbanite formed a civic group. Holly, a return migrant, and dance studio owner, founded *Steps through Time* with her community theatre group, *The Baccalieu Players*. She explained that:

...it was quite an accident...I had a friend, Mr. Leamon, at the Stone Barn, we loved to talk to people who were interested in history. He used to tell me stories about Brigus. I used to see the stories around town and he would tell me. Then I went home to my husband and said I want to write a story. Then all of the sudden *Steps through Time* was born, which was the outdoor walking tour. Then my friend Cory and I got together and did the *Baccalieu Players*, I had no ambition in tourism but we just wanted to represent Brigus theatre. It was about four years after the cod moratorium, the government was saying tourism will save us, and of course Newfoundlanders were laughing at them! We are fishermen! It was by accident. The government was interested in promoting tourism. Well, it started with Newfoundlanders were coming to see us, they brought their families. Then all the sudden we became a tourism destination (personal communication, 2012).

As expected, the establishment of the theatre led to spin-off private development, such as B&Bs. Interestingly, however, Holly explained that governments were not overly concerned about the operations of her group. Rather, their interests were in the number of tourists the community

theatre could draw into Brigus, and the private investment that could flourish as a result (Holly, personal communication, 2012).

Indeed, findings confirm that private development (e.g. restaurants, tours, accommodation) increased after the *Baccalieu Players* was formed. For example, in 1993, Bree, a return migrant, opened a small ice cream shop. Bree had returned prior to 1993, however, and was a founding member of the BDA. At that time, Bree saw the need for more tourism amenities in the community. She shared that:

...with all this going on, we needed something else, I started this business....we had the café, on North Street, and we used to have a restaurant, but now that is a private home. It was Barrett's Landing. It closed because funding ran out (personal communication, 2012).

Once Bree opened her business,

...people starting coming in and asking for food. So I started small and made sandwiches and then it just got too big, so we extended. This building used to be the Bank of Nova Scotia. When the bank closed, around the [Great] Depression time, my husband's grandfather bought the building. Then it used to be the headquarters for the fishing industry in this town. So we extended it and put in a small kitchen. Then it just evolved and I started making food here instead of at home (Bree, personal communication, 2012).

A variety of other ventures were also opened at this time. In 1997, Linda, a seasonal counterurbanite, and newcomer, moved to Brigus to operate a B&B in the historic home of Malcolm Bartlett (Table 5.2). Linda's introduction to the tourism industry was a result of a long-time friendship to a local resident, and marriage to Mr. Barrett, the then Minister of Development and Tourism (personal communication, 2012). Brigus welcomed its first RV Park in 2002. Ben, a return migrant, moved back to Brigus permanently from Alberta and opened this much-needed service for RV travellers (personal communication, 2012). Another returnee, Nick, started a historical walking tour in 2003. Like Ben, Nick returned to his home town after spending much of his life travelling the world (personal communication, 2012). A few years later, in 2007, a seasonal returnee, Sandy, bought a vacation home and turned it into a B&B. Sandy spent her childhood summers growing up in Brigus (personal communication, 2012). The most recent development was established by a local resident. This occurred in 2012, when Jason opened the town's second RV Park on the outskirts of Brigus (personal communication, 2012). Jason's RV Park was the first locally-owned tourism-related business to open since 1986, with the exception of Crystal who took over an existing firm in 1996.

As the private sector developed, so too did civic-led initiatives. In 2003, for example, Wilcox Garden was created by a group of local residents from the BHCS (Nick, personal communication, 2012). Volunteers from the community maintained the garden, which is one of only a handful of Canada's Peace Parks (Town of Brigus, 2017a). Shortly after the establishment of Wilcox Garden, the St. George's Heritage Church Committee Inc. formed and purchased the Anglican Congregation. It was repaired by the committee, a group of local residents, and became a Registered Heritage Structure in the same year (The St. George's Heritage Church Committee, 2017). Another addition, Vindicator Park, was established in 2008. The park received its name from *The Vindicator & Brigus Reporter* that produced newspapers from 1989 to 1903 (Brigus Heritage, 2017). It was founded, and is currently cared for, by the BHCS. In more recent years, the community has attracted external investment. For example, in 2005, Kent Cottage was bought by The Landfall Trust, a privately owned, Newfoundland and Labrador Registered Charity. Their goal is to 'preserve Landfall Cottage, protect the natural environment and conserve the cultural heritage for the benefit of the people of Newfoundland and Labrador' (The Landfall Trust, 2017). The structure is rented out to Canadian and international artists as part of their residence programs. The Landfall Trust indicate that they "maintain close working relationships with the Brigus Historical and Conservation Society, the St. George's Heritage Committee, the Brigus Public Library and the Brigus Town Council" (The Landfall Trust, 2017).

In 2012, the ERA Architects, along with a group of Ryerson University students, led a "community build" project in Brigus to construct a "deck-like structure on a historic lighthouse trail that had become underused" (ERA Architects, 2013). The Brigus lighthouse was nearly inaccessible by foot. As a result, the project aimed to provide better access through the creation of a trail, and to provide a platform for tourists to enjoy the view from the lighthouse. The project stemmed from recognition of the value of the lighthouse to "stimulate local and tourist engagement in an important cultural resource" (ERA Architects, 2013).

The results suggest, that over the past few decades, the town of Brigus has transformed from a historic fishing village to a cultural heritage tourism community. It is also determined that public, civic, and private entities have contributed to the town's historic cultural heritage trajectory. Surveys and interviews reveal that local residents are responsible for initial civic (e.g. BHCS in 1986) and private-led (first B&B in 1986) tourism development. Even so, rural immigrants played a significant role in furthering civic (e.g. *Baccalieu Players* in 1996) and

private-led (e.g. B&Bs in 1997 and 2007, historic walking tour in 2003) development. The next section uncovers local residents' and counterurbanites' motivations for involvement in Brigus' tourism industry.

### 5.3 Business Owner/Operator Motivations

This section describes local residents' and counterurbanites' motivations for tourism involvement. Table 5.3 further categorizes business owners/operators residential status to determine motivations by the types of counterurbanites engaged in tourism. Findings indicate that the majority (6/9) of business owners/operators are counterurbanites. Broken down further, permanent returnees (4/6) are the most common rural in-migrant type, followed by seasonal newcomers (1/6), and seasonal returnees (1/6). The remaining (3/9) business owners/operators are local to the area<sup>46</sup>.

**Table 5.3** Residential Status of Brigus Business Owners/Operators

Respondent Type	Number (n=9)	Percentage (100%)
Counterurbanites		
<b>Seasonal newcomer</b>	1	11.1
<b>Permanent newcomer</b>	0	0.0
<b>Seasonal returnee</b>	1	11.1
<b>Permanent returnee</b>	4	44.5
<i>Total</i>	6	66.7
Locals	3	33.3

Various motivations for opening a business in Brigus were shared by locals and counterurbanites. All six rural in-migrant respondents indicated that they either returned or relocated to Brigus because of ties to the community (e.g. return to rural roots, family, personal). Interestingly, all six of the same respondents also identified non-economic lifestyle reasons for opening their business (e.g. hobby, enjoy meeting people, something to do in early retirement). Other motivations include: to promote local cultural heritage (3/6), and to employ local people (1/6). In contrast, all three locals also described community ties as part of their desire to remain in the area (e.g. family, love the community where they live). However, two out of three local

<sup>46</sup> A local resident is defined here as someone whose primary residence throughout their adult life is within 25km of their business.

business owners opened their business for financial reasons, whereas one local reported non-economic lifestyle reasons for starting a tourism-related enterprise. Employing local people is another motivation noted by a local resident (1/3). Table 5.4 illustrates various motivations shared by business owners/operators<sup>47</sup>. The horizontal axis categorizes newcomer and returnee motivations for relocating/returning to Brigus and opening a tourism-related business in Brigus. The vertical axis indicates newcomer and returnee responses to motivations for relocating/returning to Brigus (community ties or lifestyle), primary motivations for opening a tourism-related business in Brigus (lifestyle or economic-enabling), and secondary motivations for opening a tourism-related business in Brigus (promote local cultural heritage and/or employ local residents). Local business owners' motivations for remaining in Brigus, and opening a tourism-related business, are also found in Table 5.4.

**Table 5.4** Motivations of Brigus Business Owners/Operators

Motivation to Relocate, Return, or Remain in Brigus	Community ties				
Motivations for Opening a Tourism-Related Business in Brigus		Lifestyle	Economic-enabling		
Secondary Motivations for Opening a Tourism-Related Business in Brigus				Promote local cultural heritage	Employ local residents
Newcomers (1)	1	1	0	0	0
Returnees (5)	5	5	1	3	1
<i>Total Counterurbanites (6)</i>	<i>6</i>	<i>6</i>	<i>0</i>	<i>3</i>	<i>1</i>
Locals (3)	3	1	2	0	1

Illustrated in Table 5.4, two of the three local business owners opened their business for financial reasons. The remaining business opened for non-economic lifestyle choices (e.g. hobby, enjoy meeting people, something to do in early retirement). For example, Crystal, a local resident, took over a government-run tourism venture for financial reasons. As an employee,

<sup>47</sup> Numbers vary since not all participants provided three motivations.



Crystal gained the knowledge needed to take ownership of the Brigus-based café (personal communication, 2012). Crystal claimed that when she first started “it was strictly for a paycheck”. However, her motivations evolved over time as her café became her social space and “passion” (personal communication, 2012). Crystal also noted the importance of family in the daily operation of her business. For example, when asked what role family plays in the business, she answered:

I would say 150 percent. My husband is my backbone, he helps me out tremendously. My kids, they are always there if need be. I have an excellent family with brothers and sisters that support me 200 percent and are always there to support me and that is the reason my business is as successful as it is today (Crystal, personal communication, 2012).

Similarly, Jason, a local resident, moved to Brigus from a neighbouring community for familial reasons. He opened an RV Park because he loves the community where he lives, and it is a way for him to remain in the area and earn an income (personal communication, 2012). Another local, Claire, was born and raised in Brigus. She inherited her house from her grandparents, was a stay-at-home mom, and is married to a business man; thus, familial reasons are one of her motivations for opening her business (personal communication, 2012). Claire also described her passion for meeting people as another motivation for opening her tourism accommodation. Operating a B&B provides an opportunity to be social, she claimed, as “we [her and her husband] don’t get to travel much, and you get a wide variety of people, so it is almost like travelling yourself... I like meeting people” (personal communication, 2012).

As shown in Table 5.4, all six counterurbanites, like locals, identified community ties (e.g. return to rural roots, family, personal) as a motivation for opening their business. However, newcomers and returnees are separated to determine if their motivations are similar or different. Some returnee examples include, Ben, an RV Park owner, who was tired of living away from home and working in an industry he did not enjoy. Ben opened his RV Park for a lifestyle change, so that he could “be his own boss” and afford to return to the community where he was raised (personal communication, 2012). Sandy, a seasonal returnee, spent many summers growing up in Brigus. She suggested that her community ties influenced her decision to open a business in the town. In addition, as Sandy entered retirement years, she wished to stay busy doing something she enjoyed (personal communication, 2012).

Others expressed that familial reasons were a contributing factor for relocating or returning to Brigus. For instance, Nick, a permanent returnee, moved home because “[his] mother was here so [he] came back because [he] could look after her as well” (personal communication, 2012). Bree, also a permanent returnee, revealed that “When I moved here I didn’t work; my husband preferred I didn’t, we were raising a family” (personal communication, 2012). However, once her children were older she decided to open a business because she “saw a niche and it needed to be filled, so [I] filled it” (personal communication, 2012). The only newcomer shared similar motivations as returnees. For Linda, a seasonal newcomer, personal connections to a local friend and her marriage to a local Newfoundlander provided the opportunity for her to become involved in the B&B business (personal communication, 2012).

Other motivations, shared by all counterurbanites, were non-economic lifestyle-related (e.g. hobby, enjoy meeting people, something to do in early retirement). Bree, for example, described the freedom she gained from starting her own business. She stated that “If I knew that I had to get up every day and do the same drudgery, I wouldn’t do it, but every day is different, it is new faces and new experiences” (personal communication, 2012). She continued, “it’s the reason I get up in the morning...I will never retire...I am enjoying life because I enjoy people” (personal communication, 2012). Relatedly, Linda’s and Sandy’s desire to meet people was a factor in their decision to operate their own B&B. For example, Linda shared that she “enjoy[s] people, that is the best answer I can give you. I get pleasure” (personal communication, 2012). This illustrates that the one newcomer had similar motivations to returnees for opening her business.

Nick finds pleasure in his work as an historical walking tour guide. His love of the community’s cultural heritage is what motivated him to pursue his tourism venture. Nick also expressed his passion for the community, and his fear of Brigus’ historic past becoming less common in the tourism experience (personal communication, 2012). Like Nick, Ben also enjoys promoting the area and sharing his experiences with visitors to his RV Park. Moreover, he expressed his satisfaction in sharing the history of the community with his guests, along with things to do and undiscovered places to go. Holly, a return migrant, was motivated “purely [by] pleasure” (personal communication, 2012). She is very involved with the St. George’s Heritage Church (hosts the dinner theatre), and was inspired because of her creative talent. Founding

*Baccalieu Players Inc.* was a way for Holly to promote the community and educate local youth about Brigus' history (personal communication, 2012).

In addition to the primary motivations mentioned above, offering employment is an important factor for Bree. She pointed out that she “creates employment in the community”, and that students can “bank their cheque and live off their tips” (personal communication, 2012). Bree also generates seasonal employment for many local residents.

It is concluded that locals and counterurbanites had similar motivations for remaining, and relocating or remaining, in Brigus, respectively (i.e. community ties). Local business owners were more likely to open a tourism firm for financial reasons (2/3) than non-economic reasons (1/3). In contrast, all six counterurbanites were motivated to open a tourism business for non-economic lifestyle reasons. It is also worth noting that newcomers and returnees to Brigus shared similar motivations for returning/relocating and opening a business in Brigus. Though, this does not necessarily provide an accurate account of the differences between newcomer and returnee motivations due to the small sample size (1 newcomer). The next section will uncover the processes driving Brigus' tourism development.

#### **5.4 Processes Driving the Tourism Development Trajectory**

This section explores how different groups (locals and counterurbanites) are contributing to Brigus' tourism development trajectory. This is achieved through a branching innovating trajectory, by way of a number of different processes (i.e. recombination, layering, and conversion). These processes merge place-based assets (e.g. culture, local knowledge) with innovation in the creation of a tourism firm. In doing so, in-migrants contribute to neo-endogenous development by enhancing and diversifying cultural heritage tourism products (Steel and Mitchell). To accomplish this, business owners/operators (local and counterurbanite) were asked whether or not their firm capitalized on local cultural heritage assets. This determined whether or not firm owners/operators were engaging in recombination, or if they were contributing to the tourism trajectory through layering and/or conversion. Layering involved the addition of new businesses that deviated from the original tourism product (one that does not reflect local cultural heritage). The process of conversion is determined if business owners/operators indicated that they had converted their product mix to include products and/or services that were not characteristic of Newfoundland's cultural heritage. Interviews with other

groups (public, civic) determined their contributions, if any, to the tourism trajectory. Results suggest that civic groups and business owners/operators used a variety of techniques to represent Newfoundland characteristics in their products and/or services.

Illustrated in Table 5.1, local residents and civic organizations were the drivers of early tourism development. Each group, including the BHCS, BDA, and Town Council, engaged in recombination of local cultural heritage. For example, the BHCS funded and maintained local historic sites that represent aspects of the community's past. Town Council was a key player in driving tourism development. This was visible through fundraising efforts for local historic sites, and in the allocation of government monies to historical development of the downtown core. Also, the Blueberry Festival has become an anchor event in the area, which draws thousands of visitors each year. This event was established by local residents in partnership with Town Council, and hosts activities and vendors that offer products and services that reflect Newfoundland cultural heritage (e.g. local food, handcraft products).

#### **5.4.1 Recombination**

Local residents furthered recombination via private development. Two of the three local business owners reported that their products and/or services reflect local cultural heritage. For example, one local resident, Crystal, baked products that represented Newfoundland dishes. To illustrate this, Crystal made reference to her "traditional Newfoundland menu", where "all foods are made at the café", and "local suppliers such as farmers and fishermen supply us with veggies and fish" (personal communication, 2012). She continued to explain that "our desserts are only offered at our café and are typically Newfoundland recipes, mostly family recipes that have been passed down, scone Jam-Fresh Scone Cream" (personal communication, 2012). Another local business owner, Claire, reported making homemade jams from local berries and Newfoundland food for her guests (personal communication, 2012).

Similarly, others are contributing to the cultural heritage tourism trajectory neo-endogenously. The results indicate that all six counterurbanite business owners/operators engaged in recombination via capitalizing on local cultural heritage assets. Three of six counterurbanites specified that their food options were in line with Newfoundland cuisine. For example, Bree revealed that "everything is made from scratch" and that she bought local products, such as blueberries and Atlantic cod, for her "infamous" blueberry crisp, and cod

chowder. She also indicated that her blueberry crisp was a staple dessert; each year “for the blueberry festival, we will do 150 pans, takes us four straight days” (personal communication, 2012). Others shared that they served homemade meals to their B&B guests. For example, Linda noted that “foods [are] prepared and served using berries, seafood etc. from the community” (personal communication, 2012), whereas Sandy pointed out that she “provide[s] locally made jams from local berries....[and] plans Newfoundland themed breakfasts e.g. homemade Newfoundland berry muffins and fish cakes, [and] blueberry pancakes” (personal communication, 2012). The examples above illustrate in-migrants use of local assets, combined with extra-local resources (e.g. cultural and financial capital), to further the branching innovating trajectory (i.e. path-creation) in the tourism industry.

Other approaches to this see five out of six in-migrant firm owners/operators use recombination processes to communicate Brigus’ history with their visitors. This method sees the “recycling and recombination of cultural forms” for the purpose of visitor consumption (Richards, 1996b, p. 9). For example, Holly founded, and is the artistic director of, the *Baccalieu Players Inc.* Prior to 2012, Holly wrote and directed *Steps through Time*, described as a “professionally-performed historical walk through town” (Lane Photography, n. d). According to the Town of Brigus’ website, *Steps through Time* was:

...a series of plays [that] brings stories to life about celebrated Arctic explorer, Captain Bob Bartlett. Performed by members of The Baccalieu Players, each of the four 20-minute theatrical presentations takes place once a week throughout the months of July and August (Town of Brigus, 2006a).

When *Steps through Time* was discontinued<sup>48</sup>, it was replaced with, *Live on the Lawn*. This play is performed on the grounds of the Hawthorne Cottage, and is followed by a dinner theatre at a local community centre (Holly, personal communication, 2012). Additional acts were performed by the *Baccalieu Players* during dinner (Holly, personal communication, 2012). Plays are “locally written and performed with a cast of actors, singers, and dancers” (Ayad, n.d). The Hawthorne Cottage Site Supervisor suggested that Holly contributes significantly to teaching younger generations about the history of Brigus (Carol, personal communication, 2012). She is involved in Newfoundland Social Studies at the local public school, “so they learn about their

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<sup>48</sup> It is unclear when *Steps through Time* discontinued. However, from discussions with business owners it appears to have ceased somewhere between 2008 and 2012.

communities, about the fishery...they take a full week where they make projects on the history of Newfoundland” (Carol, personal communication, 2012).

Four out of six counterurbanites also engaged in recombination by promoting the history of Brigus through their business; albeit, on a smaller scale. Innovative diversification of traditional infrastructure for tourism consumption is a common form of resource recombination, such as farmhouse B&Bs (Marsden et al., 2012). Nick described his historical walking tour as: “I give them a map and the tour is about 1.5 hours. I start at the Stone Barn and walk up to Vindicator Lane and then to Beaver Pond and then to Harbour Drive” (personal communication, 2012). Throughout the walk, he provided facts about these historic figures and landmarks in the community. Similarly, Linda stated that she could “give visitors and guests a feel for the story and experiences the area has to offer” (personal communication, 2012). Her B&B occupies the historic home of Captain John Wilcox; adjacent to Wilcox Garden (The Virtual Museum of Canada, 2017a). Thus, Linda is able to offer personal and community knowledge of the heritage building to her guests. Alternative approaches to capitalizing on local heritage were shared by Sandy and Bree. For instance, Sandy stated that she decorated her B&B with “artwork that displays the culture and history of Newfoundland” (personal communication, 2012). In addition to serving locally sourced food, Bree offered handmade products, such as “music, crochet, knitting, woodworking, [and] books”, that reflect a Newfoundland theme (personal communication, 2012).

However, as the industry becomes saturated with similar tourism products and services, a change within the commercial landscape is necessary to avoid stagnation. This typically involves layering, which Martin (2010) suggests “constitutes only a small change of the institution as a whole, but this process can be cumulative so that there is ‘on-path’ evolution of the institution, leading to mutation or even transformation of the institution’s fundamental nature” (p. 21). Examples of this process in Brigus are few, but are described below.

#### **5.4.2 Layering**

Though recombination is the dominate process driving Brigus’ tourism trajectory, other processes are also at play. This is verified in two businesses that engaged in layering. One of these businesses is owned by a local resident. In 2012, Jason opened an RV Park that was unlike other local businesses. He claimed that his tourism-related venue was not reflective of the local

cultural heritage. The other example of layering comes from a counterurbanite. In 2007, Sandy recombined local cultural heritage (e.g. artwork, Newfoundland meals) with modern amenities at her B&B. While not necessarily upscale, Sandy's B&B was the first accommodation in Brigus that offered tourists a Newfoundland experience with modern touches. This layering process does not appeal to all, as one guest review indicated,

The house is very new, so without any historical charm. I choose B&Bs for the quirkiness and character that normally comes with them. [Sandy's B&B] felt too much like staying in a suburban home for us (TripAdvisor, MeghanSGP, 2015).

To remain competitive, both Jason and Sandy innovated within the existing tourism trajectory. By including modern amenities, for example, Sandy altered the branching innovating trajectory through path-extension. This, however, often leads to changes within existing tourism firms (i.e. conversion). Only one example of this was found in Brigus, at Bree's café.

### **5.4.3 Conversion**

Martin (2010) defines conversion as the re-orientation of "existing structures and arrangements of an institution...to serve new purposes or in response to external pressures or developments" (p. 21-22). One return migrant engaged in conversion<sup>49</sup> in response to the demand for modern products. Bree reported the addition of innovative food options that fell outside of traditional Newfoundland culinary. This conversion occurred when they "ran into people with allergies and we owned the fish plant on the water which was processing fish, so instead of buying chowder, I got fresh fish" (personal communication, 2012). Her newer products include vegan and gluten-free dining options. As a result of this, Bree stated that the "celiac association of Newfoundland and Labrador, and Canada, have us listed as a gluten-free restaurant. We have vegan also!" (personal communication, 2012). She also claimed that her café is on Twitter and Facebook, and that "we are worldwide now, and people are saying that they are sitting in a little town in rural NL eating gluten-free" (personal communication, 2012).

In short, recombination is occurring in Brigus' public, non-profit, and commercial development. Recombination is accompanied by layering and conversion; albeit, this was true of only three tourism firms, and was occurring in the later stage of the community's tourism

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<sup>49</sup> Bree engaged in conversion as her business grew from an ice cream shop to café (e.g. added gluten-free and vegan food options). However, the date conversion occurred could not be determined.

trajectory. It is important to note that two of the three businesses that were altering the local tourism development path are owned by rural in-migrants (both returnees). This suggests that returnee counterurbanites are contributing to neo-endogenous processes in Brigus, by extending and renewing the tourism trajectory. Next, is to determine whether or not counterurbanite business owners/operators are mobilizing local labour and building local capacity; other processes, along with recombination, layering, and conversion, which helps facilitate neo-endogenous development.

## **5.5 Counterurbanite Mobilization of Local Labour**

A number of studies highlight the importance of rural in-migrant business owner's contributions to local job creation (Bosworth, 2006, 2009; Jack and Anderson, 2002; Kalantaridis and Bika, 2006). Additionally, Atterton et al (2011) suggest that rural in-migrant entrepreneurs participate in neo-endogenous development "through job creation, generating additional income or providing vital services" (p. 262). The results indicate that this process is occurring in rural Newfoundland.

According to survey and interview data, tourism generated local employment in the town of Brigus. Shown in Table 5.5, the industry produced roughly 20 jobs in the region in 2012. Local business owners created three of these jobs (15.0%). Additionally, the BHCS created approximately seven (35.0%) employment opportunities in that tourism season. Counterurbanites generated approximately ten (50.0%) employment opportunities; one (10.0%) came from a newcomer, and nine (90.0%) from two returnees. On a per business basis, counterurbanites average 1.6 employees. Examined another way, newcomers employ roughly 1.5 local residents, whereas returnees average one employee at their business. Local business owners staff an average of one local resident. The following section explores rural in-migrant business owner/operator involvement in mobilizing the local labour market.



**Table 5.5** Local Residents Employed in Tourism in Brigus

Employer	Full-time seasonal	Part-time seasonal	Full-time year-round	Part-time year-round	Total
<i>Counterurbanites</i>					
Newcomers	1	0	0	0	1
Returnees	9	0	0	0	9~ <sup>50</sup>
<i>Others</i>					
Locals	2	1	0	0	3
Civic Sector	7	0	0	0	7
Total # of Jobs	19	1	0	0	20

Two out of six counterurbanite business owners/operators employed ten local residents, seasonally. Three of these ten employees were funded through government student employment programs<sup>51</sup>. As indicated earlier, businesses have the option of applying for summer student employment grants. According to the Community Sector Council of Newfoundland and Labrador (2010b) website, the student summer employment program “provides funding to assist Private Sector employers and Not-for Profit Organizations to create summer jobs for students”. However, jobs must aim to achieve enhanced employment opportunities or provide the opportunity for students to develop new skills (Community Sector Council of Newfoundland and Labrador, 2010b). This topic is discussed further in Section 5.6.

Holly also employed local residents. However, the exact number is undetermined. Though, records suggest that:

...theatrical presentations are commissioned by the HSNL with a playwright, and performed by the Baccalieu Players which are composed of a group of local youth. Through these plays the HSNL supports and fosters theatrical arts in the community and also contributes to local understanding and pride in the community heritage (Parks Canada, 2007, p. 16).

This suggests that Holly’s theatre group, *The Baccalieu Players*, are generating income for at least some of the youth involved.

Both return migrant business owners revealed that each year they apply for student employment funding. Bree reported that over the past two decades, she has grown her staff from one to ten people. She employed four cooks, one dishwasher, one front of house staff, and three summer students (government funded) (personal communication, 2012). Holly, the founder of

<sup>50</sup> ~ Indicates approximate number of jobs, as the number of jobs created by Holly is unknown.

<sup>51</sup> See Government of Canada. (2017a).

the community theatre group, did not indicate the number of people she employed (this number fluctuated). However, she did state that employment is dependent on successful applications of summer student grants. Those that did receive funding are students from her dance studio (personal communication, 2012).

One newcomer employed one local staff full-time, seasonal. Her employee helps her with the daily operations of her B&B, such as cleaning linen, preparing meals, taking reservations etc. According to Linda, she has employed the same person for nearly a decade. Recently, she has taken on a new employee as her former worker resigned (personal communication, 2012).

The remaining local and counterurbanite tourism business owners/operators reported no employees. Further investigation discovered that most tourism operators prefer to be self-sufficient, given the small size of, and personal attachment to, their business. Moreover, many of these entrepreneurs became involved in their venture out of pleasure; thus, they typically prefer to handle tasks on their own (Researcher's notes). One RV Park operator indicated that he had intentions of hiring local residents. However, 2012 was his first year in business and he was unable to determine the number of employees he may need in the coming years (personal communication, 2012).

The BHCS also employed two full-time students, seasonally, through federal funding. One rural in-migrant is responsible for the original grants used to establish the Stone Barn Museum. Therefore, this suggests that at least one rural in-migrant is partially responsible for the creation of student jobs with the BHCS. In addition, the St. George's Heritage Church employed three local residents (Nick, personal communication, 2017), and one local was employed full-time, seasonally, at the Hawthorne Cottage.

In summary, it is determined that one local resident provided three jobs at her tourism business. In contrast, one newcomer in-migrant and two returnee in-migrants provided one and nine jobs, respectively. Although tourism did provide employment for local residents, job openings were limited. Employment was generated two ways: directly from tourism firms, or indirectly, through government grants. Relatedly, tourism employment generated new skills and knowledge. As such, the next task is to determine the impact of counterurbanite externally-accumulated capital on building local capacity.

## **5.6 Building Local Capacity**

Described in Chapter 2, ‘capital’ can be manifested in several forms, some of which include social, cultural, and financial resources. From this, economic capital may be accumulated over time, and influence the local development trajectory. The results suggest that counterurbanite business owners/operators in Brigus were contributing to neo-endogenous development via social (e.g. strengthening local networks, volunteering), cultural (e.g. enhancing local skills and knowledge), and financial (e.g. injecting money, facilitating local wealth generation) capital. Findings of rural in-migrant capital are presented in three main sections (social, cultural, financial) below. Their contributions have resulted in an innovating branching economy as seen earlier, through recombination, layering, and conversion processes. The following sections provide examples of extra-local capital, and its impact on various aspects of community capacity building.

### **5.6.1 Social Capital**

One way that counterurbanites are generating social capital is through volunteering. Findings show that four out of six rural in-migrants (1 newcomer and 3 returnees) belonged to at least one local organization to which they volunteered their time. Several examples are provided below to demonstrate this impact.

Bree was a founding member of the BDA. During her interview, she described how the BDA wanted to “raise money to fix up the town” (personal communication, 2012). To accomplish this, Bree sought and secured funding for the Stone Barn Museum, as a member of the BDA. Additionally, with the help of local residents, Bree launched the Blueberry Festival. After a couple of years, Bree passed on the responsibility of Chairperson to a local resident (personal communication, 2012), the Mayor, who has organized the event ever since.

The Blueberry Festival garnered much volunteer support from members of the community. For example, members of the St. George’s Heritage Church and the Brigus Fire Brigade sold raffle tickets for prizes to fundraise their respected organization (Mayor of Brigus, personal communication, 2012). This yearly event also fostered relationships with various civic groups and local businesses. For example, local vendors (business and non-profit) paid half the price charged to an outsider operator. Providing a discount for locals is a method of encouraging participation from the community. In the Mayor’s own words, “we try to keep it to local

charities. There are the really good causes, nationally, but we try to keep it local” (personal communication, 2012). Although locals were responsible for hosting the Blueberry Festival, Bree clearly played a role in founding this community event.

Counterurbanite involvement in the volunteer sector also created opportunities for social engagement, and extended opportunities for locals to become involved. For example, Crystal has a booth each year at the Blueberry Festival. The event provides her the opportunity to sell moose burgers to raise money to support the local fire station (Crystal, personal communication, 2012). The festival also fostered community spirit and brought together volunteers from various groups. For example,

The beauty is, you can leave and stroll around, drop in St. George’s Heritage Church, you can walk out to the Stone Barn Museum, you can visit Hawthorne Cottage, or you can walk to the Tunnel, see the sail boats, feed the ducks, there is so much to do. There is a dance on Thursday, Friday, Saturday and Sunday, great selection of local Newfoundland food, entertainment and crafts...it is a great opportunity for vendors to make money (Mayor of Brigus, personal communication, 2012).

Furthermore, counterurbanites that volunteered to help organize the Blueberry Festival inadvertently draw in tourists that shop at local businesses.

Another example of volunteer efforts is the *Baccalieu Players*, founded by a return migrant. Holly never took a salary from her more than 15-year involvement with the Brigus theatre group. What is more, Holly established a tourism-related service that attracts many volunteers from the community. She stated that “we are non-profit...none of us are salary, but you would be surprised at the commitment” (personal communication, 2012). Thus, Holly’s local connections contribute to capacity building, as she has mobilized local volunteers to participate in community-based activities.

To open his business, Nick volunteered at the Stone Barn Museum. Through volunteering, Nick developed relationships with elderly local residents, and spent time speaking with “the 80 and 90 year olds in the community” to learn the history. Nick also volunteers at the local library (personal communication, 2012). Linda, the only newcomer to Brigus, also volunteers as a long-time member of the BHCS. She also supports and attends the local church. Linda had resided part-time in Brigus for 15 years. Her permanent residence is in St. John’s, close to her friends and family. Despite her part-time residency in the community, she stated “I am very involved in the community, but, you know, it is still my summer community” (personal communication, 2012). This example illustrates the community building commitment of part-

time newcomers. The examples above demonstrate the dedication of five counterurbanites to local civic organizations. Their contributions to fostering volunteer opportunities, or individually participating in civic activities, were present at many local organizations or tourism-related events. Rural in-migrant cultural capital also induces neo-endogenous development. These examples are listed below.

### 5.6.2 Cultural Capital

Cultural capital is measured based on level of education, metropolitan living and travelling experience, and know-how. Rural migrants with a college degree, or higher, received their education in a metropolitan centre. This implies that counterurbanites in Brigus possess urban living experience and education that may contribute to building local capacity. Table 5.6 lists counterurbanites (newcomers and returnees) highest level of education. The majority of rural in-migrants possess a college diploma or higher.

**Table 5.6** Counterurbanite Business Owners/Operators Highest Level of Education

Level of Education	Newcomers (n=1)	Returnees (n=5)
Graduate degree (Ph.D. or Master's)	0	1
Bachelors	0	2
College/Trades	1	1
High school	0	0
Unknown	0	1

Also, the findings indicate that rural in-migrants facilitate skill building and knowledge transfer while engaging in volunteer positions, and through hiring local residents. Two counterurbanites (one returnee and one newcomer) mentored summer students at the Stone Barn Museum. For instance, each summer Linda volunteers at the local museum assisting summer students with daily operations. In addition, her personal experience as a tourism operator, along with her local (e.g. business community) and external (urban connections i.e. marriage to Tourism Minister) networks, may have enhanced local knowledge of the tourism industry.

Nick also mentored local students. He is motivated to volunteer to generate youth interest in the history of Brigus. While volunteering, Nick observed that students did not appear to be interested in Brigus' history, so he wanted to make it more appealing. As a volunteer curator, he was able to study Brigus' past; "I went through all the history and there is an accumulation of history...and got a background from reading books and materials" (Nick, personal

communication, 2012). With this knowledge, Nick was able to educate local youth. He also wrote two books: *Walking Tours of Brigus* and *Corner Boys of Brigus*. Nick lived away for roughly 30 years, and gained volunteer experience while travelling through Canada and to Asia and Costa Rica (personal communication, 2012).

Holly's urban living and travel experience, as well as her education, contribute significant cultural capital to the community. Holly is a fully qualified and experienced professional dance teacher (e.g. ballet, jazz, tap, ballroom and step dancing). She teaches dance classes to about 240 students a week at her studio. She is educated in Ballroom Dance, Cecchetti Ballet and tap dancing from the Imperial Society of Teachers Dance in London England, and Latin Dancing from the Canadian Dance Teachers Association. She was a member of the Newfoundland Dance Teachers' Association, and has studied traditional step dancing with international experts. She received her academic education at Price of Wales Collegiate and Memorial University in St. John's, Newfoundland and Labrador (anonymous, 2017). Holly claimed that many of her students use their learned skills to go onto careers in theatre (personal communication, 2012). Her performers participated in hundreds of local festivals and events; travelling across Canada and to the United States to perform (personal communication, 2012). Her teaching has sent some of her students to programs at national institutions for dance. She worked with elementary schools on their dance curriculum, and is the founding member of the *Baccalieu Players*. (anonymous, 2017). Carol, a resident who grew up in Brigus, explained: "you have to know Holly. She has a big influence on the acting and dancing and plays in the community" (personal communication, 2012). Holly suggested that the local theatre has "brought out a lot of shyness in people when they got to act, I think that if it came back, people would act again, because it was their show" (personal communication, 2012).

Counterurbanites reported securing funding for civic sites and summer student programs. For example, Bree reported that successful grant applications enabled her to employ three summer students. Her cultural capital accumulated, in part, from her time spent living in an urban area, which "broadened her mind", as well as being raised in a "business family" (personal communication, 2012). According to Bree, to have a successful business in the community "you need to have the social capital....we have travelled a lot and eaten at a lot of different restaurants" (personal communication, 2012). Attaining a business loan was relatively easy for Bree, because "back then you could get a loan on a handshake" (personal communication, 2012).

Bree's business skills also helped secure funding for the Stone Barn Museum and Blueberry Festival; the latter to which she chaired for two years.

Carol, the Hawthorne Cottage Site Supervisor, first became involved in tourism working for Bree scooping ice cream at her café (personal communication, 2012). Carol had initially moved away to find employment due to the lack of jobs in the area. She returned home because she was "homesick" and began working for Bree. A short while later, Bree "told her about the job [Hawthorne Cottage Site Supervisor], wrote me a reference, and I got it...there was nothing else in the community before in terms of jobs, so this was great, we didn't have summer jobs" (Carol, personal communication, 2012). Carol has been Site Supervisor for nearly two decades. As of 2012, the Hawthorne Cottage had been open for 18 seasons, and averages about three to five thousand visitors each year. An influx of visitors has created financial benefits for businesses and local residents (Carol, personal communication, 2012). Holly also received grant money from the provincial government to pay her summer students. She purports "our students are from my dance studio. We just pray that they get funding. All [actors] are local and many have gone onto careers in theatre" (personal communication, 2012).

Counterurbanite life experiences and business connections also contribute to the success of their business. For example, Sandy shared that her experience staying at B&Bs and travelling, helped her develop a sense of what was needed to operate her business. Through Bree's travel experience, she learned that tourists enjoy a variety of culinary options. This encouraged her to offer gluten-free and vegan dishes, along with a wide variety of tea (personal communication, 2012). Nick suggested that travelling the world and working for tour companies in Thailand, Costa Rica and Nova Scotia, help him gain experience in the tourism industry. For example, "I couldn't afford to do things so I would set up [and organize] tourists to go on the elephant or go to the boats" (Nick, personal communication, 2012). Thus, these experiences, he claimed, led to the success of his own walking tour.

It is concluded that rural in-migrant cultural capital has been accumulated through traveling and urban living experience, and the completion of post-secondary education. Their skillsets (e.g. grant writing) and acquired knowledge (e.g. education) are benefitting local residents via employment and mentoring. Furthermore, their volunteer and/or business activities help promote the community and fundraise for local causes. The next section examines how counterurbanites have contributed to the creation of local financial capital.

### 5.6.3 Financial Capital

An influx of rural in-migrant financial capital is also present in Brigus. For example, Bree's family owns the fish plant where she receives local fish for her café. She also owns the building that her business occupies. Bree indicated that starting her business was a struggle, but owning the land gave her an advantage. She backed her argument up by suggesting that as "someone coming in from the outside, they would have to rent. I own my home here, it would have to be someone who lives here otherwise it would just not be viable" (personal communication, 2012).

The founding of the community theatre group is another example of the benefits of returnee migrant financial capital. Holly injected financial capital into Brigus through Community Economic Development (CED) money (personal communication, 2012). For example, she sought provincial government funding (CED) to start her local theatre group. In her own words:

The very first year, we went to the Arts Council and asked for \$2000, they gave us \$600. So I said, we can't do this for \$600. Then I picked it up a week later and said I can do this, and put \$3000 of my own money into it and I said if we make money I will take it back, if not then it will be donated to the project...the next year we sought more funding...we were supposed to be self-sufficient in five years, and we were self-sufficient in four years (personal communication, 2012).

An influx of counterurbanite financial capital also has indirect benefits for the community. Illustrated above, their discretionary wealth, used to start their own business, indirectly provided financial capital to those they employed. Aside from providing local employment, one return migrant provided space for local residents to sell their handmade products to fundraise and to earn personal income. For example, Bree allowed an 88 year old local resident to sell her hand-knit items from her storefront. Another lady with an autistic son, who makes soap to fundraise to send autistic children to camp, sold her products from Bree's business. Others crochet, knit, or make handcrafted products that Bree placed on consignment. She claimed that all her soaps, candles and jams are locally made (personal communication, 2012).

Financial benefits of rural in-migrants also result from the visitors that they draw to the community. For example, the theatre group attracts approximately 2500 tourists each summer (Holly, personal communication, 2012). According to Holly, this influx of visitors brings external money into the community. She also claimed that the "local shops were telling us that



they were serving more tourists on the days we had *Steps through Time*” (personal communication, 2012).

These examples indicate that rural in-migrant financial capital is contributing to tourism development, and, benefiting local residents who may otherwise have no place to sell their handmade products. Monies invested by rural in-migrants, used to establish their business, also led to job creation.

## **5.7 Conclusion**

In short, the civic sector, comprised primarily of local residents, initiated the tourism path trajectory. The majority (6/9) of tourism-related business owners, however, are rural in-migrants. Of these, five out of six are returnees; only one newcomer was found to operate a tourism-related business. Familial and lifestyle motivations were the most common responses for relocating/returning and opening a tourism-related firm, respectively. Counterurbanites contribute neo-endogenously, albeit, minimally, to path-extension and path-renewal, through layering and conversion. They also contribute neo-endogenously to local job creation, and social, cultural, and financial capital. The following chapter examines the same parameters in the region of Trinity Bight.

## **6 Trinity Bight**

### **6.1 Introduction**

Chapter 6 presents the research findings for Trinity Bight, organized by the study's three objectives. The first section establishes the region's cultural heritage tourism trajectory, by describing the importance of various sectors (private, civic, public) and demographic groups (locals and counterurbanites). The second section uncovers local resident and counterurbanite motivations for opening tourism-related firms. The final section, in three parts, considers if immigrants are contributing to neo-endogenous development.

### **6.2 Development of the Cultural Heritage Tourism Trajectory in Trinity Bight**

This section describes the development of Trinity Bight's cultural heritage tourism trajectory.<sup>52</sup> To accomplish this, contributions from public, civic, and private sectors are explored, with the latter divided into local resident (private and non-profit) and counterurbanite (private and non-profit) groups, to reflect proprietor's business type, and residential history. Table 6.1 illustrates the stage at which these participants engaged in tourism development, the nature of their involvement (e.g. accommodation), their receipt of government funding, and, the development process employed. Each of these is described below, with the exception of the latter, which is considered in a later section.

Trinity's tourism trajectory began in the 1950s. Although a popular destination for wealthy St. John's residents since the early 1900s (Martin, personal communication, 2012), tourism facilities to accommodate this influx were not constructed until 1948. In that year, Trinity Cabins was established by a returnee, Stephen Morris, who realized, on his return, that Trinity's first tourists were faced with a lack of accommodation and food services (Trinity Historical Society, 2014g). By opening this venue, Morris is credited with "pioneering" Trinity's "modern day tourist industry" (Trinity Historical Society, 2014a).

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<sup>52</sup> All businesses in Trinity's tourism district were contacted and a sample of those in the Trinity Bight region.

**Table 6.1** Chronological Dates of Tourism Development in Trinity Bight

Date	Venture by North American Industry Classification System (NAICS)	Sector	Funding/Financial Aid	Process
(-1992) Pre-moratorium				
1948/1995 <sup>53</sup>	Accommodations (721192)	Private	Yes	Recombination
1964	Non-profit Organizations (813410)	Civic	Yes	Recombination
1967	Museums (71211)	Civic	Yes	Recombination
1979	Accommodation and Food Services (721)	Private	No	Recombination
1982	Accommodation and Food Services (721)	Private	No	Recombination
1985	Accommodations (721191)	Private	No	Recombination
1986	Non-profit Organizations (813410)	Civic	Yes	Recombination
1991	Accommodations (721191)	Private	Yes	Recombination
1991	Museums (71211)	Civic	Yes	Recombination
(1992) Post-moratorium				
1993	Entertainment (71111)	Civic	Yes	Recombination
1993	Accommodation and Food Services (721)	Private	No	Recombination/Clustering
1994	Entertainment (71111)	Civic	Yes	Recombination/Clustering
1995	Accommodation and Food Services (721)	Private	No	Recombination/Layering
1996	Accommodations (721191)	Private	No	Recombination
1996	Heritage Sites (71212)	Civic	Yes	Recombination
1997	Heritage Sites (71212)	Civic	Yes	Recombination
1997	Entertainment (713990)	Private	Yes	Recombination
1997	Accommodation and Food Services (721)	Private	No	Recombination
1997	Accommodation and Food Services (721)	Private	Yes	Conversion
1999	Accommodation and Food Services (721)	Private	No	Conversion
2000	Accommodations (721192)	Private	No	Layering
2001	Entertainment (711311)	Civic	Yes	Recombination/Clustering
2001	Retail (711511)	Private	No	Recombination
2003	Retail (453220)	Private	No	Recombination
2004	Entertainment (512130)	Civic	Yes	Recombination
2006	Accommodations (721191)	Private	No	Recombination
2006	Food Services (722512)	Private	Yes	Recombination/Layering
2008	Museums (71211)	Civic	Yes	Recombination

<sup>53</sup> Accommodation venue first opened in 1948 and was bought by its current owner (study participant) in 1995.

<b>2008</b>	Food Services (722511)	Private	Yes	Recombination/Layering
<b>2009</b>	Entertainment (487210)	Private	Yes	Recombination
<b>2011</b>	Retail (453220)	Private	Yes*	Recombination/Layering
<b>2011</b>	Accommodation and Food Services (721191)	Private	No	Layering
<b>2011</b>	Heritage Sites (71212)	Civic	Yes	Recombination
<b>2012</b>	Retail (311351)	Private	No	Layering
<b>2012</b>	<i>Accommodation and Food Services (721)</i>	<i>Private</i>	<i>Yes</i>	<i>Conversion</i>
<b>2012</b>	<i>Personal Care Services (812190)</i>	<i>Private</i>	<i>No</i>	<i>Conversion</i>
<b>2013</b>	<i>Conference Centre (721110)</i>	<i>Private</i>	<i>No</i>	<i>Conversion</i>

Trinity's tourism developed further during the pre-cod moratorium period in response to continual fishery decline. According to the Mayor, during the 1950s and 1960s, the "economy started to go downhill. A number of people got together and formed the Trinity Historical Society [THS]".<sup>54</sup> Under the direction of Morris (the THS President between 1966 and 1995; Trinity Historical Society, 2014a), the society implemented its mandate, which is: "preserving, presenting and promoting the tourism and heritage of these twelve communities [Trinity Bight]" (Mayor of Trinity, personal communication, 2012; Trinity Historical Society, 2014b).

Numerous initiatives were taken between the society's founding and the cod moratorium. In 1967, for example, a 1880s saltbox home in Trinity was converted into a museum to display artifacts related to local cultural heritage (Newfoundland and Labrador Tourism, 2017d; Trinity Historical Society, 2014h). This was one of the first museums in rural Newfoundland, and the first historic site acquired by the THS (Trinity Historical Society, 2014h). According to a summer resident, who grew up in the area, "all kinds of people would come here to see the museum" (Berry, personal communication, 2012). In addition to this property, the THS also played a role in the preservation of many other historic structures, which facilitated their eventual designation (Table 6.2). The first registered heritage site was established in Trinity in 1968, with the construction of the Reverend John Clinch National Heritage Site Plaque. Reverend Clinch was the first man to introduce the smallpox vaccine in North America to residents of Trinity and Bonavista (Trinity Historical Society, 2014a) (Table 6.2).

<sup>54</sup> The Trinity Historical Society was formally known as the Trinity Historic Sites Committee, formed in 1964 to "gather information on the history of Trinity and to preserve it for future generations" (Trinity Historical Society, 2014f).

**Table 6.2** Municipal Heritage Actions and Provincial/National Designations

Year	Designation
1968	Reverend John Clinch plaque (NHSP)
1979	Lester-Garland Premises designated (PHS)
1986	Hiscock House designated (PHS)
1987	St. Paul's Anglican School designated (RHS)
1987	The Methodist Schoolhouse/ Society of United Fishermen designated (PHS)
1988	Trinity Train Loop recognized (RHS)
1991	Interpretive Centre created (Lester-Garland Premises)
1991	Campbell House designated (RHS)
(1992)	Post-moratorium
1992	Green Family Forge designated (RHS)
1993	Trinity Historic Area designated a Municipal Heritage District; The Gover and Slade Houses designated (RHSs)
1994	The Nathaniel Morris House designated (RHS)
1998	Courthouse, Gaol and General Building and Mortuary Chapel designated (RHS)
1999	Grant's Stage & Coleman/ Jenkins Commercial Establishment designated (RHS)
	Church of the Most Holy Trinity and Parish Hall (RHSs)
2006	Municipal plan amended to expand Historic Area
2007	Trinity Heritage Area created and designated a Municipal Heritage District
2010	Archibald Christian House (RHS)

Notes; these designations include the following: NHSP: National Historic Site Plaque; PHS: Provincial Heritage

Site; RHS: Registered (Provincial) Heritage Structure

[http://www.trinityhistoricalsociety.com/community\\_historic\\_sites.htm](http://www.trinityhistoricalsociety.com/community_historic_sites.htm)

The local public sector guided many of the society's activities during the pre-moratorium period. In the early 1980s, for example, the Municipality designated a Historic Area containing the largest concentration of its heritage assets (CBCL Ltd., 2011). In addition, it established building regulations and controls (CBCL Ltd., 2011), which subsequently guided the THS work. These actions, combined, created "one of the most notable heritage communities in the province of Newfoundland and Labrador" (CBCL Ltd., 2011, p. 5).

Additional private-led tourism businesses also were established in this early stage, with each opened by a counterurbanite. In 1976, Nancy, a newcomer from England, and her husband, Pete, moved to Trinity to participate in whale research. They explained that at that time, the local museum and Trinity Cabins were the only tourism attractions in the area. By 1979, they had opened a five- bedroom lodging and tavern to accommodate the increasing number of tourists (Nancy, personal communication, 2012). Tammy, a return migrant to Trinity, bought a rundown building for the purpose of creating additional tourism accommodations. Shortly after this purchase, in 1982, she opened an inn, which was positioned in the neighbouring community of

Port Rexton (personal communication, 2012). Three years later, in 1985, another return migrant, Charles, along with his wife Lorain, repurposed a historic home into a B&B in Trinity East (Lorain personal communication, 2012). Finally, in 1991, a newcomer from Holland converted an historic residence (circa 1840) into a living museum B&B (Tracy, personal communication, 2012), which was subsequently designated a Provincial Heritage Structure (Table 6.2) (Heritage Newfoundland and Labrador, 2016a).

The post-moratorium period saw considerable local civic sector activity. The THS continued its preservation efforts with the addition of seven historic structures (RHSs) (Table 6.2). For example, an 18<sup>th</sup> century home, owned originally by a local blacksmithing family, was restored in 1991, opened as a museum, and registered a Heritage Structure by the Heritage Foundation of Newfoundland and Labrador in 1992 (Table 6.2) (Trinity Historical Society, 2014i). In 2007, the THS converted the old Cooperage, and in 2008 opened it as a living museum (Trinity Historical Society, 2014c). In 2012, they opened the historic Lighthouse at Fort Admiral's Point, which provides interpretive tours to the public (Trinity Historical Society, 2014d).

The municipality also contributed to Trinity's evolution. In 2004, for example, the annual Trinity Festival was re-launched by the Town Clerk, and continues to be a yearly event (Trinity Town Clerk, personal communication, 2012). In 2006, it amended the Town Plan to expand the Historic Area (CBCL Ltd., 2011). The new district, now called the Trinity Heritage Area, became a designated Provincial Municipal Heritage District in 2007 (Canada's Historic Places, 2017c). In the same year, the town developed a *Guide for Construction or Renovation in the Heritage Area*, providing "specific direction for renovation of existing structures as well as requirements for new construction in the Heritage Area"—a document that subsequently influenced the THS's preservation efforts (CBCL Ltd., 2011, p. 7).

Private sector investment escalated after the moratorium. Yet, local residents only played a minor role. In 1995, Trinity Cabins was bought by Martin and Joy (Martin, personal communication, 2012) and, in 2000, another local resident opened the region's first vacation home rental (Janet, personal communication, 2012). In contrast, counterurbanite presence increased after the moratorium and their actions furthered the tourism development trajectory.

Lorain, and her husband Charles, were among the first to invest in Trinity following the moratorium. In 1992, they sold their B&B, relocated to Trinity (proper<sup>55</sup>), and purchased the local fishing wharf to accommodate a restaurant, art and craft gallery, and marina (Lorain, personal communication, 2012). Lorain asserted that “this old building that was built in 1970 was falling down...so we bought the old building, but realizing we couldn’t tear it down, we decided to restore it” (personal communication, 2012). In the same year, Tammy bought another property, a late 19<sup>th</sup> century home that had served as a local general store until the 1970s. The building “lay in disrepair” prior to Tammy’s restoration efforts (anonymous, 2017). Once purchased, Tammy transformed the property into a seven-guestroom inn with an adjacent casual fine dining restaurant and gift shop (anonymous, 2017).

A year later, in 1993, Rising Tide Theatre relocated to Trinity (Bonnie, personal communication, 2012). From 1987-1993, the theatre company was based in St. John’s (Bonnie, personal communication, 2012), moving seasonally to Trinity (since 1993) to conduct the outdoor *New Founde Lande Trinity Pageant* (Rising Tide Theatre, 2017). In 1994, the company launched *Summer in the Bight* theatre festival, that consists of plays, concerts, and a dinner theatre (Rising Tide Theatre, 2017). Many claimed that Rising Tide Theatre is central to the region’s success as a tourism destination (Researcher’s notes). For example, a seasonal tourism operator acknowledged that initial tourism growth in the area was slow, but “then of course the cod moratorium [occurred], [and] Rising Tide Theatre started here and the B&Bs arrived and the restaurants” (Berry, personal communication, 2012). Some asserted that establishment of the theatre company marked the beginning of significant regional tourism investment. Described further,

...with Rising Tide Theatre coming here in 1992, and building a home in 2000, a significant investment has been made to the town by them and by the government that also fund them for script development. It happened at the cod moratorium, yes in 1992, they partnered up with the development association here at the time....with the provincial Historic Sites Association and the Department of [Tourism, Culture and] Recreation to have the scripts written (Mayor of Trinity, personal communication, 2012).

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<sup>55</sup> Local residents refer to Trinity as “Trinity Proper” in circumstances where confusion arises between Trinity East and Trinity (Researcher’s notes).

In 1995, after three years of construction, Lorain and her husband opened their combined marina, restaurant, and gallery (personal communication, 2012). Two more B&Bs opened in 1996. One, established by Tim, a seasonal return migrant, and his wife, is located in Tim's hometown of Dunfield in Trinity Bight (Tim, personal communication, 2012). The other was opened by newcomers, Gary and Zoey, from Toronto, Canada. A year later, Tracy founded the region's first luxury inn, featuring an upscale restaurant, lounge, and a seaside open-deck (Researcher's notes).

In 1997, Rising Tide Theatre's Co-founder, and Artistic Director, moved permanently to Trinity to focus on the construction of a lasting facility to host her performances (Bonnie, personal communication, 2012). That same year, a seasonal return migrant started a historical walking tour business. Berry, the owner, grew up in the near-by community of Ireland's Eye and moved to Trinity when he was two years old. Increasing demands for tourism accommodations led Gary to establish the area's second luxury inn and restaurant in 1999 (personal communication, 2012). Following this, Rising Tide Theatre opened its doors in 2001 in the heritage district of Trinity (Bonnie, personal communication, 2012). In the same year, two seasonal rural in-migrants from Washington, D.C, United States, opened an art and antique map gallery (Max and Carrie, personal communication, 2012). Two years later, another seasonal rural in-migrant, Denise, opened the region's first jewelry store. Native to Prince Edward Island, Denise resides in Trinity East for the summer and sells unique handcrafted products made from local minerals and gemstones (Denise, personal communication, 2012).

In 2006, Philip established Trinity Bight's first coffee company, accompanied by a new café and accommodation business. Philip is a newcomer to Trinity, but native to Newfoundland. His grandfather was once the Trinity Mayor and President of the THS, who helped establish the first local museum (Mayor of Trinity, personal communication, 2012). Naturally, Philip followed his grandfather's footsteps and became the President of the THS. Also in 2006, Kim opened a B&B in the late 19<sup>th</sup> century former home of a local cobbler (anonymous, 2017). A second café arrived in 2008 in Port Rexton (Trinity Bight), owned by Cindy and Chris, a husband and wife from the United Kingdom (Cindy, personal communication, 2012), and, in 2009, seasonal return migrants Cynthia and Bill, started the second whale watching business in the area (Cynthia, personal communication, 2012).



Three additional tourism businesses opened between 2010 and 2012. Tina, a seasonal counterurbanite from St. John's, relocated her artisan jewelry and art store to Trinity, several years after purchasing a summer home there. In 2011, Victoria and Bethany, sisters from Australia, established the first hostel in the region and spend the off-season gaining employment and education in Europe and Canada, respectively (Victoria and Bethany, personal communication, 2012). In 2012, a confectionary chocolate shop, the first of its kind to the region, opened by seasonal rural in-migrants from Toronto, Canada (Mary, personal communication, 2012). In 2012, a sommelier was added to Tracy's restaurant, to broaden the services offered (Tracy, personal communication, 2012), and in the future, a spa and wine bar is to open by Tammy's daughter (Tammy, personal communication, 2012). Similarly, Gary indicated the he has plans to open a conference centre adjacent to his inn and restaurant (Gary, personal communication, 2012).

It is clear that Trinity Bight has become a regional tourism destination. Local civic groups are primarily responsible for leading development, particularly during the pre-moratorium period. This was accomplished through the founding of the THS and, with guidance from Town Council. Since the cod moratorium, and the surge in cultural heritage tourism, few local residents have become involved<sup>56</sup>, with non-local investments dominating. To determine why this is the case, the next section uncovers counterurbanites' motivations for involvement in Trinity Bight's tourism industry.

### **6.3 Business Owner/Operator Motivations**

Listed in Table 6.3, are different types of business owners/operators that participated in this study. A total of 19 participants are recorded. Among these were 17 (89.5%) counterurbanites and two (10.5%) local<sup>57</sup> business owners/operators. As shown, seasonal newcomers (7/17) were the most common type of counterurbanite, followed by permanent newcomers (5/17) and seasonal returnees (5/17). No respondents indicated that they were permanent returnee business owners/operators.

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<sup>56</sup> Only one local tourism-related business included in this study was opened post-1992. However, it was not feasible to survey all businesses in Trinity Bight. Therefore, there may have been other local tourism-related businesses that opened post-1992 that were not included in this study.

<sup>57</sup> A local resident is defined here as someone whose primary residence throughout their adult life is within 25km of their business.

**Table 6.3** Residential Status of Trinity Bight Business Owners/Operators

Respondent Type	Number (n=19)	Percentage (100%)
Counterurbanites		
<b>Seasonal newcomer</b>	7	36.9
<b>Permanent newcomer</b>	5	26.3
<b>Seasonal returnee</b>	5	26.3
<b>Permanent returnee</b>	0	0.0
<i>Total</i>	<i>17</i>	<i>89.5</i>
Locals	2	10.5

Further analysis revealed that over half (12/17) of counterurbanite business owners/operators lived seasonally in Trinity Bight. Nearly half (8/17) of counterurbanite-owned businesses had proprietor(s) who were born in Newfoundland, while four (23.5%) originated from Europe, three (17.6%) from mainland Canada, one (5.9%) from the United States, and one (5.9%) from Australia. Their motivations for relocating/returning to Trinity Bight, and opening a tourism-related business, are found in Table 6.4. The horizontal axis categorises newcomer and returnee motivations for relocating/returning to Trinity Bight and opening a tourism-related business in Trinity Bight. The vertical axis indicates newcomer and returnee responses to motivations for relocating/returning to Trinity Bight (lifestyle: vacation home/rural living experience, community ties and economic opportunity), primary motivations for opening a tourism-related business in Trinity Bight (lifestyle or economic-enabling), and secondary motivations for opening a tourism-related business in Trinity Bight (promote local cultural heritage and/or employ local residents). Local business owners' motivations for remaining in Trinity Bight, and opening a tourism-related business, are also found in Table 6.4.

**Table 6.4** Motivation of Trinity Bight Business Owners/Operators

Motivations for Relocating, Returning or Remaining in Trinity Bight	Lifestyle						
	Vacation home/vacationed and decided to relocate to experience rural living/amenities move	Community ties	Economic opportunity				
Motivations for Opening a Tourism-Related Business in Trinity Bight				Lifestyle	Economic enabled		
Secondary Motivations for Opening a Tourism-Related Business in Trinity Bight						Promote local cultural heritage	Employ local residents
Newcomers (12)	9	2	1	3	9	8	3
Returnees (5)	0	5	0	3	2	3	2
<i>Total Counterurbanites (17)</i>	<i>9</i>	<i>7</i>	<i>1</i>	<i>6</i>	<i>11</i>	<i>11</i>	<i>5</i>
Locals (2)	0	2	0	0	2	2	0

As seen in Table 6.4, both local business owners/operators chose to remain in the area for lifestyle reasons related to community ties (e.g. rural roots, family, personal reasons). Their motivations for opening a business were due to economic circumstances (2/2). Locals also reported motivations to promote local cultural heritage (2/2).

For example, the owners of Trinity Cabins live permanently in the neighbouring community of Trouty. Martin shared that he wanted to remain in the area, “I have always loved Trinity, it has a lot of history” (personal communication, 2012). Their reason for taking over the business is because Joy had worked for the previous owner for 13 years. When the owner became ill, the couple decided to seize the opportunity because Joy already “knew the ropes”

(Martin, personal communication, 2012). They were inspired for the “love of the business” and “love of meeting people” (personal communication, 2012). In 2000, the second locally-owned business was opened by Janet, who “saw the need” for more accommodations (Janet, personal communication, 2012). Locals are also interested in promoting the cultural heritage of the region. For example, Martin stated “our cabins are the first tourist cabins in Newfoundland, and we are trying very hard to preserve the old uniqueness of them, and to keep the history of them alive!” (personal communication, 2012).

Counterurbanites’ motivations are also referred to in Table 6.4. Their motivations for relocating or returning to Trinity Bight are categorized as lifestyle<sup>58</sup> or economic. The majority of counterurbanites relocated or returned to Trinity Bight for lifestyle reasons (16/17). More specifically, over half of newcomer rural in-migrants were influenced to relocate (seasonally or permanently) to Trinity Bight because they bought a vacation home, vacationed in the area and decided to move there permanently (9/17), had community ties (e.g. family, personal reasons) (2/17), or for economic opportunities (1/17). The majority of counterurbanites, however, opened their business for economic-enabling reasons (e.g. to support their rural lifestyle, enable them to move permanently) (11/17), while the remainder were motivated by lifestyle reasons (6/17). Yet, for most, the ability to secure employment enabled their temporary or permanent rural lifestyles.

Newcomers and returnees are separated to determine if their motivations are similar or different. Newcomers (12/17) account for all counterurbanites that chose to relocate, for reasons such as owning a vacation home, or because they fell in love with the area while on vacation and decided to move (9/12). Newcomers also relocated to Trinity Bight because of community ties (2/12) and for economic factors (1/12). Newcomers’ motivations for opening a business in Trinity Bight were related to lifestyle choices (3/12) or economic-enabling circumstances (9/12). Other motivations mentioned by newcomers are related to promoting the local cultural heritage (8/12), and employing local residents (3/12).

For example, Cindy is a newcomer, who moved to Trinity Bight permanently after frequent visits to Newfoundland with her family. What was supposed to be a “onetime trip” became a six-year annual vacation. Cindy explained that her family “completely fell for the area. We went home and we realized that it is one thing falling in love with a place as a tourist, but

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<sup>58</sup> Lifestyle motivations for relocating, returning or remaining in Trinity Bight are many. These lifestyle motivations are in line with those referred to in Chapter 2.

quite a different experience to be in a community” (personal communication, 2012). To determine their rural living compatibility, her family organized a house swap with befriended Newfoundland locals. In her own words, “by the time the month was up, my partner [Chris] said ‘this is it’”. For Cindy and Chris, moving to Newfoundland was a lifestyle choice, whereas opening their business was a way to afford to live in rural Newfoundland (personal communication, 2012).

Seasonal counterurbanites, too, relocated to Trinity Bight temporarily for lifestyle reasons. Like Cindy, Tina is a seasonal newcomer counterurbanite. Opening her business in Trinity Bight has enabled Tina to spend the entire summer, as opposed to only a few weekends, at her seasonal home. Life-long artistic aspirations led Tina to open a business in the region (personal communication, 2012). She explained this as such,

I can do what I love to do, I mean, my job, I have to work, I am not ready to retire, so I have to work and I don’t want to go back to nursing or pharmaceutical sales. I am passionate about what I do, I love what I do. There are not enough hours in the day to do what I want to do. So I can have the lifestyle out here, the tourist area, the social aspect, I can do what I want to do in an area I want to be (personal communication, 2012).

Some newcomers, however, moved to Trinity Bight, *and*, opened a business for lifestyle reasons. For example, Gary, a permanent rural in-migrant from Toronto, moved to Trinity Bight while still employed in a high-paying professional career. Gary and his family are lifestyle counterurbanites, as he indicated that his family “left Ontario because we had fairly strong views about an economy on steroids and it was endless consumption and endless development and I think we found it not terribly palpable” (personal communication, 2012). In relation to his own circumstances, Gary suggested that there is “this new breed of people. They are not status driven or money driven. They want to be comfortable and they want time off in the winter but they also want to live a rural life” (personal communication, 2012). After a short time living in Port Rexton, another tourism operator requested his assistance hosting their overflow of overnight tourists. Because of this, he became aware of a niche that needed to be filled and started his own accommodation business. A decade and a half later, he is a self-proclaimed accidental tourism operator, and believes living and working in rural Newfoundland “is a way of life” (Gary, personal communication, 2012).

Tracy and her family are originally from Europe. They relocated to St. John's and purchased a vacation home in Trinity. Their original move to Newfoundland was for work-related purposes. Yet, their venture to the popular outport region was non-economic. For newcomers Tracy and her daughter Violet, opening their rural business, they suggested, was "first, and foremost, it's a lifestyle...it was always quality of life that drove us and we went from there" (personal communication, 2012). In Violet's words, "I basically have the self-satisfaction of being able to live in a rural area for six months of the year. There is quality of life! The other six months I get to travel the world...I am not here to make big bucks, but I have managed to tweak it so that I make money and live the ideal lifestyle" (personal communication, 2012). For Tracy, her entrepreneurial spirit drove her to expand her B&B business to include luxury accommodations (personal communication, 2012).

Likewise, seasonal business owners, Victoria and Bethany, are "very social people", who host music events and bonfires and "just like hanging out...it is our social gathering", referring to their accommodation business (personal communication, 2012). As newcomers from Australia, the sisters were also drawn to the different lifestyle. For example, one declared "I have had another job that I got after I graduated, that I could have kept, that I would have made a shit load of money but this is so much more fun!...our full-time jobs afford us to be able to keep coming back here and doing this" (Victoria, personal communication, 2012). Clearly the decision to open a business was non-economic.

Others, who were motivated to relocate for lifestyle reasons, however, opened a business for economic reasons. By way of illustration, Philip, a permanent newcomer, made a lifestyle choice to move back to Newfoundland, and locate in Trinity, out of dissatisfaction from working and living in a major city in British Columbia. Though, Philip explained, "I have to make a living and I want to make a living here rather than elsewhere and my mom is here and she is older so I am trying to be as close to her as I can... stay close to family, my mom and a couple sisters, so they are close by" (personal communication, 2012). In need of a lifestyle change, Philip quit his high paying job in Vancouver: "I had to figure out a way to move back and make a living...and there was tourism, in the summer... obviously one of my motivations is to make money" (personal communication, 2012).

In contrast, all five returnees were motivated to move back to Trinity Bight (seasonally or permanently) because of community ties. Returnees' motivations to open rural businesses in the

area included lifestyle choices (3/5) and economic-enabling circumstances (2/5). Secondary motivations mentioned by returnees included: promoting the local cultural heritage (3/5), and employing local residents (2/5).

Naturally, rural roots played a role in returnees' decision to establish a local enterprise. For example, Berry, a seasonal return migrant, operates a tourism-related venture in Trinity. At an early age, he relocated to Trinity from Ireland's Eye during the Newfoundland resettlement program. Berry was fortunate to have summers off from his school teaching position in St. John's. This enabled him to return to Trinity during summer break and offer historical walking tours. His community ties became obvious, as he explained "my father was a fisherman all his life so the summertime we were always here. I used to fish. I would come back and fish with him in the summers when I was off from school" (Berry, personal communication, 2012). His hobby-style business is clearly not motivated by profit. Rather, each summer, Berry offers a walking tour that captures "the whole history of Trinity" as a way to promote his community pride (Berry, personal communication, 2012).

Another returnee, Tammy, desired to return to her home town after years away in the city of Toronto. A change in her life-course, along with the rise of opportunities in Newfoundland's tourism industry, was a chance for Tammy to move back to Trinity (personal communication, 2012). In her own words,

Trinity was my home town. It broke my heart when I had to leave. Even as a child, my roots go back so deep here, I mean ancestors go back to some of the original settlers here. That was a big part of it, [I] wanted to be back in Trinity, and I never thought I would have the opportunity to come back to Trinity (Tammy, personal communication, 2012).

After some thought, Tammy came to the conclusion that "Trinity had so much potential...I could make a living here and hopefully for my family" (personal communication, 2012).

As such, a desire for a lifestyle change, coupled with ties to the community, influenced her decision to return. However, opening her accommodation business ultimately facilitated financial aspects required for this transition.

A rural lifestyle and community ties were what motivated Bill and Cynthia to return to the region for the summers. Bill was born and raised in the area. Cynthia moved from Alberta to Newfoundland to complete a master's degree. Bill's father hired Cynthia at his whale watching business through a summer student grant program. Years later, Bill and Cynthia married and

took over the family business. Both have full-time careers and permanent residency in Alberta. Job flexibility allows them to spend the summers in Trinity working at their part-time tourism business. The profit they acquire through their whale watching business enables them to enjoy their desired lifestyle (Cynthia, personal communication, 2012).

Both newcomers and returnees shared secondary motivations for opening their businesses. Some indicated that their business was, in part, a way they could promote the area's history. For example, Kim, a newcomer, restored a historic home into a B&B. She suggested that, like herself, a number of seasonal residents are also partaking in the renovation of homes in Trinity. With an aging population, and outmigration of youth, Kim feared for the long-term sustainability of the community's cultural heritage. In her own words, "There are a number of us that want to keep this town alive and are very passionate about it, but I don't think that is enough" (personal communication, 2012).

Returnees, Cynthia and Bill, also took pride in promoting local cultural heritage and Newfoundland's wildlife. As someone who grew up in the area, Bill possessed the knowledge to offer historic accounts and an authentic experience to their whale watching customers (personal communication, 2012). This is explained by Cynthia, as:

So cool to be out there and to give people that information, about why things work the way they do, why the ecosystem is the way it is and also political things, such as whaling, how we are concerned about it and how it affects us here. It is educational, and as a teacher it is near and dear to my heart (personal communication, 2012).

Promoting the history of Newfoundland is something that Bonnie strives towards. When the Co-founder was asked about the evolution of her theatre, she stated:

...just my love of Newfoundland and Labrador, and at the time, we saw ourselves as one of the forces, with the theatre, that we were creating the voice and image or the painting, but we wanted to create a voice for our own place and we didn't feel that was there, (St. John's) and that was a lot of the motivations I guess was to try to position Newfoundland somewhere it could have pride. And a lot of that had been damaged, especially in my generation, during the battle for Confederation and the way we went into Confederation. So in that way, the artistic community, a lot of it wanted to reclaim a place for Newfoundland and we were stirred by Newfoundland and the things that had impacted it. It really means a lot to us. That was a lot of the motivation and when I came here, even before I moved here, because I had spent a lot of time out and around Newfoundland so you could see what was happening to rural Newfoundland and to me the death of rural Newfoundland will be the death of what makes this place special (Bonnie, personal communication, 2012).



Creating jobs was also cited as a motivation for some pursuing rural businesses. For instance, Bonnie, a permanent newcomer from St. John's, envisioned her theatre company as a way to "save one community" (referring to Trinity), and create employment opportunities in the region (personal communication, 2012). This motivation was also shared by returnees. Lorain, for example, started her business with a vision of offering employment to locals who lost their jobs during the collapse of the fishery. Profit was never a motivation for Lorain. She suggested, "I didn't need the money from this place but other people did have to have money" (personal communication, 2012).

These findings suggest that newcomers were mainly motivated to relocate (seasonally or permanently) because they owned a vacation home or because they once visited the area on vacation and decided to relocate. Yet, newcomers (9/12) and returnees (5/5) were both motivated to relocate (seasonally or permanently) to Trinity Bight because of community ties; albeit this motivation is more common among returnees. Motivations for opening a tourism-related business included lifestyle (non-economic) and economic-enabling. Three of 12 newcomers and three of five returnees reported lifestyle motivations. The remaining nine newcomers and two returnees reported economic-enabling circumstances for opening their tourism-related business.

It is now established that rural in-migrants are largely responsible for private firm development in the region. A variety of rural in-migrant types were identified. Similar and different motivations were expressed by newcomers, return migrants, and locals. It must now be determined, to what extent, if any, counterurbanites are contributing to the region's branching innovating development trajectory.

#### **6.4 Processes Driving the Tourism Development Trajectory**

This section explores how different groups (locals and counterurbanites) are contributing to Trinity Bight's tourism development trajectory. This was achieved through a branching innovating trajectory, by way of a number of different processes (i.e. recombination, layering, and conversion). Recombination merges place-based assets (e.g. culture, local knowledge) with innovation in the creation of a tourism firm. In doing so, in-migrants contribute to neo-endogenous development by enhancing and diversifying cultural heritage tourism products and/or services (Mitchell and O'Neill, 2017). To accomplish this, business owners/operators (local and counterurbanite) were asked whether or not their firm capitalized on local cultural

heritage assets. This determined whether or not firm owners were engaging in recombination, or if they were contributing to the tourism trajectory through layering and/or conversion. Layering involved the addition of new businesses that deviated from the original tourism product (one that does not reflect local cultural heritage). The process of conversion was determined if business owners/operators were converting their product mix to include products and/or services that are not characteristic of Newfoundland's cultural heritage. Interviews with other groups (public, civic) determined their contributions, if any, to the tourism trajectory. Results suggest that civic groups and business owners/operators used a variety of processes to represent Newfoundland characteristics in their products and/or services, which, in turn, reflect neo-endogenous goals.

Illustrated in Table 6.1, local residents and civic organizations were the drivers of early tourism development. More specifically, Town Council and the THS were the first stakeholders to engage in recombination of local cultural heritage. For example, Trinity Cabins and the Trinity Museum were among the first tourism attractions to the area, which were established by local residents and the THS respectively. Moreover, both amenities represent aspects of the community's past. Town Council was a key player in driving tourism development. This was visible through the establishment of Trinity's Historical Zone.

Like the town of Brigus, a branching innovating trajectory was underway in Trinity Bight. The once "hub" of economic activity was confronted with the decline of traditional industries. As such, the region's commercial homogeneity inevitably succumbed to external "shock" (Steen and Karlsen, 2014, p. 134). In light of economic decline, new development paths have emerged. However, dissimilar to Brigus, counterurbanite-led tourism development began much earlier than the 1992 cod moratorium. For example, rural in-migrant business owners/operators have contributed significantly to neo-endogenous development starting as early as 1979, which also occurred via recombination of cultural heritage. Over time, further counterurbanite development was visible through innovation, diversification, and repurposing of local assets, which furthered neo-endogenous development by strengthening the region's identity through its place-based assets. A saturation of tourism enterprises, however, led to a demand for innovative products and services. Because of this, in recent years, the region has experienced new layering and conversion processes, which have extended and renewed the path trajectory. Furthermore, at least one business has engaged in clustering, which was present in the addition

of new products and services that also recombine cultural heritage (i.e. Rising Tide Theatre). The following is a detailed discussion of Trinity Bight's tourism path trajectory.

#### **6.4.1 Recombination**

Local residents furthered recombination via private development. One of the two local business owners reported that their products and services reflected local cultural heritage. For example, the owners of the local tourist cabins try to maintain the rustic authentic appeal by limiting modern amenities (e.g. T.V), and they share the local history and culture with their guests by taking them out cod jigging and teaching them how to panfry fish (Martin, personal communication, 2012).

Findings indicate that all but one of 17 counterurbanite business owners/operators engaged in recombination. This was achieved through the use of: a) Newfoundland food and/or local ingredients; b) art and/or décor that reflected local cultural heritage; and c) historic attributes, such as built heritage (e.g. structures) or thought expression (e.g. interpretation, experiences). For example, six out of 17 counterurbanite business owners/operators used Newfoundland recipes and/or made their dishes from scratch with local food (e.g. berries, cod). For example, one newcomer couple "use local produce whenever possible, we grow our own vegetables...we use local berries to make our jams, chutney and preserves" (Cindy, personal communication, 2012). Another counterurbanite promoted local products through her website,

The [omitted] services as much local produce as possible. Lettuce for salad and herbs for all our dishes are grown in the garden. Fresh cod is delivered from Princeton Freshwater, directly supporting local fisherman. Rhubarb is cut daily from the backyard for our popular rhubarb custard tartlets, and wild flavourful berries picked from the hillside are used for jams, muffins and desserts (anonymous, 2017).

A return migrant also made use of their website to advertise dining options that "fuse contemporary cuisine with traditional Newfoundland recipes and ingredients. When possible, we source our ingredients locally including our fresh seafood and produce" (anonymous, 2017). Changing dietary needs create a niche market in rural areas in particular. Such demands provide an opportunity for innovation and growth in a tourism trajectory, and thus expanding neo-endogenous development (Slee and Kirwan, 2009).

A total of nine out of 17 newcomers and returnees displayed art and décor, or, sold products that reflected local cultural heritage or a general Newfoundland theme. For example, six

business owners sold artwork (personally or for a local resident) inspired by Newfoundland scenery or depictions of Newfoundland culture. One respondent professed: “I love making authentic stuff, I love when people get excited that it is authentic” (Tina, personal communication, 2012). This comment was followed up on their website, which lists products such as “art-scapes created from Newfoundland photos and pictures...dory dipper boats<sup>59</sup>... [and] earrings made from cod bone ear” (anonymous, 2017).

Other examples included two newcomers who sell local and non-local Newfoundland artwork, used, intermittently, as inside décor. A café owner explained this process,

We have an art exhibition that changes every month and the concept behind it is that we look for artists who are either based in Newfoundland or their art is influenced by Newfoundland so the guy who is on at the moment, he has a summer house here, and he lives in Toronto for the rest of the year, but all his work is inspired by local landscapes. And likewise, [name omitted], she is a water colourist who lives in St. John’s and her work is around Newfoundland so that is the concept behind the artwork (Cindy, personal communication, 2012).

Recombination was also visible through the incorporation of Newfoundland style architecture. For example, Philip, a newcomer, sought a local artist to design and construct his café. He explained this thinking as such,

...there is a local guy, who is an artist, and he has designed a lot of houses in the area, so we work with him, and we told him what we wanted to do to the inside, so he made it look proportional, so it looks good to the eye, this building was built in 1974, vinyl siding, so instead of spending money on business cards and advertising, I put it on the front, he made those windows look nice right, appeal to the eye, all proportional. He is from Trinity East, Frank went away to arts school came back, does all this paint work, late 70s, he came back to Newfoundland does a lot of artwork, fantastic stuff, but now he does a lot of design, he designs houses, he worked with me on the outside of the building, he does a lot of backdrops for tourism (personal communication, 2012).

Some incorporated local built heritage into their business. For instance, four rural in-migrant business owners/operators repurposed heritage structures for B&Bs. Others restored dilapidated buildings of historic significance, for example, “it was a government wharf until we bought it...this old building was built in 1710, was falling down...so we bought the old building, but realizing we couldn’t tear it down we decided to restore it again” (Lorain, personal

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<sup>59</sup> A dory is a small fishing boat traditionally used by the Portuguese to go cod fishing off the coast of Newfoundland (Grand Bank) (Dwyer, 2000).

communication, 2012). Using this last example, counterurbanite entrepreneurs' use their extra-local resources (e.g. finances) to protect and promote place-based assets; neo-endogenously furthering the cultural heritage tourism trajectory.

Depicting local cultural heritage, either through interpretation, visualization, or interactions, is a method used to provide guests with an authentic experience. For example, the owner of a local walking tour “combines Newfoundland history, Trinity history, and family history, to create a 500-year story of culture and heritage...I also play court records, burial records, shipwreck and diary entries as I move from one stop to another on a portable speaker” (Berry, personal communication, 2012). Others explained that they “offer tours around for our guests that are focused on history and culture” (Victoria and Bethany, personal communication, 2012).

A newcomer, and artisan jewelry and art store owner, provides an authentic experience to her customers in this way,

I have a story behind my material, paintings, cod ears, clay pipes on the beach in Trinity. I have a story behind all my products. Then they ask you about the moratorium and you tell them the story. I like to be an ambassador, tell people where to go, give history, and tell them about my province. My studio is also traditional, on the water. I like to facilitate conversation with my customers, whaling and all that stuff with tourists, sharing conversation. I love educating people about the area. We love to brag about where we live (Tina, personal communication, 2012).

Alternatively, owners of a local whale watching business offered Newfoundland nature-based experiences, while also incorporating local history. They explained this further,

...we are more interested in nature, so I guess that is all part of the Newfoundland experience. People come here for the whales and icebergs and nature and that is all a part of the Newfoundland experience. When there are icebergs we provide that and the whales we can pretty much always provide that. Right now we try to make a point of talking to people who are fishing and we explain a lot about the history of the area that we are in and things like that. We do what we can...it is more based on the nature aspect then on the culture, but I believe that they get some of the culture anyway (Cynthia, personal communication, 2012).

Counterurbanites also provided authentic services by employing local residents. The idea is that tourists can experience local culture through interaction with native Newfoundlanders. For example, one of the reasons Gary hired employees locally is to add value to his business. In other words,

At first I thought that it may be a little discriminatory but then I realize that a big part of the interpretive experience is that we try not to do things standing on ceremony or being pretentious, or silly, but all the people who serve dinners in there are from here. They can tell stories about the fishery, they know about the capelin cycle and they speak with a dialect, they slow it down a bit but still. If you go to the south you don't want to run into someone who is polish you want to run into some who says 'hi, ya'll'. So that is all a part of the experience without feeling too contrived. And we feel very strongly about that. To me, the interpretation that goes on when you rub-up against someone in a local bed and breakfast or dinner room, is as good as anything because you are dealing with the real thing (Gary, personal communication, 2012).

Cindy, also a newcomer, appreciates the value of promoting local talent and opening her space to local performers. She explained:

...we have music events through the summer, they are usually emerging bands from St. John's, the idea of that is to bring music out of St. John's...people who wouldn't normally play outside of the big cities, we try to encourage that as well as bring in local musicians, a mix of bringing in music, that local people wouldn't normally hear, and local musicians playing here as well. We very much promote local involvement. It is one of our key things (personal communication, 2012).

Cultural representation is important to a professional theatre Co-founder too. The theatre offered tourists performances that reflected the cultural heritage and history of Trinity. This finding is supported on the company's website,

Every summer and fall Rising Tide Theatre presents an award-winning blend of plays that reflect the history and culture of Newfoundland performed by more than 40 of the Province's most talented artists in one of our most magnificent settings (Rising Tide Theatre, 2017).

Seen above, when in-migrants communicate the valorization of a community's cultural heritage identity through innovation, they both reinforce and innovate the development trajectory. Consequently, by reinforcing the current trajectory, the existing path may become locked-in. Because of this, layering and conversion processes are determined necessary to avoid stagnation and/or decline.

As illustrated above, the region has experienced an influx of entrepreneurs who have engaged in recombination of traditional industry. More recently, however, at least ten of 17 rural in-migrant businesses have facilitated path-extension or path-renewal. As a result, layering (path-extension) and conversion (path-renewal) processes have led to further industry diversification.

Layering is the processes whereby new firms are created that offer non-traditional products and/or services to the existing tourism industry (i.e. not engaging in cultural heritage recombination). As new businesses with innovative products and/or services open, some existing firms may convert their original products to remain competitive and relevant. The following are examples of layering and conversion processes that took place in Trinity Bight.

#### **6.4.2 Layering**

Layering processes were present in Trinity Bight. According to Steen and Karlsen (2014), this involves the “changing composition of firm and non-firm actors as well as other assets” (p. 141). An example of this is the other local resident that was surveyed, who reported that her cottage rental business did not reflect local cultural heritage. Alternatively, findings indicate that at least seven of 17 in-migrant-owned businesses demonstrated layering processes. Though, some businesses engaged in recombination *and* layering, while others mirrored layering only. Businesses that resembled recombination *and* layering (4/17) typically recombined cultural heritage into their firm, while also introducing new products and/or services that deviated from the original tourism theme (i.e. did not resemble local cultural heritage).

For example, in 2006, a native Newfoundlander wished to return home after spending 30 years on the west coast. He designed his business to conform to local architecture. Yet, Philip realized the market was competitive, as described below,

We looked at what wasn't here; we provide any of the needs of the tourist... I am creative by looking around to see what is not here and then trying to provide it. I am not here to compete with anyone that is already existing. I found the niche. In order to survive in rural Newfoundland you have to be creative, if you're not, you're done, it is as simple as that. If you try to do what everyone else is going to do it is not going to work, you will do o.k. for a couple years but eventually you will just fizzle out, you have to stand out from the crowd. And part of that is being creative. You have to provide something unique (personal communication, 2012).

To remain relevant, Philip differentiated his business from surrounding firms by offering food that is unique to the area (personal communication, 2012), such as yogurt parfait and specialty sandwiches (anonymous, 2017). Philip also founded Trinity Bight's first coffee company. He carried a variety of blends, including one named after his business. This coffee blend is “carefully selected medium and dark roast coffee from Central America—blended to enhance their flavours” (anonymous, 2017). Therefore, Philip's business used recombination of

cultural heritage, *and* layering, as seen in the addition of non-traditional cultural heritage tourism products (e.g. South American coffee).

Unique products were also found at the café business founded by counterurbanites from England, who “saw a gap in the market” (Cindy, personal communication, 2012). Though many aspects of their business represent recombination processes (e.g. Newfoundland art, local performances), the couple introduced products that were relatively new to the area. For example, after several vacations, the couple determined that:

...things need to change in the food industry in Newfoundland. This is just tourism aside, and maybe it is the tourism that will actually swing it and push it, but it is horrendous. Everything is deep fried...when we opened I had one gluten-free cake option and I thought I will just put that on for whatever. And now it is just crazy we have I think there are probably four or five gluten-free cakes down there right now, um, vegan cake, we are getting people with all these allergies coming through. We have somebody from the film crew coming in, it is the only thing she can eat, dairy-free gluten-free and egg. She can't eat egg (Cindy, personal communication, 2012).

Another example of recombination and layering was the addition of an unconventional tourist accommodation to the area. Trinity Hostel, constructed in 2011, is the only hostel in the region. In fact, according to the sisters, the province of Newfoundland and Labrador does not recognize hostels as legitimate businesses. They explained this as such: “we are unique in the area both as the sole hostel in our immediate area, and a unique hostel compared to other hostels in Newfoundland” (Victoria and Bethany, personal communication, 2012). Existing tourist accommodations consisted of B&Bs and inn-style retreats and lodges. Although the hostel is unconventional, compared to existing tourism firms, the owners were enthusiastic about promoting the local area. They did this by designing a website that promoted local businesses and history about the region. In this sense, recombination of cultural heritage was an aspect of their business. However, layering helped avoid lock-in by diversifying into an untapped market (i.e. hostel). By doing this, the owners extended the existing tourism path trajectory while keeping within the cultural heritage theme.

A Trinity-based jewelry retailer also contributed to regional diversification. In 2011, a business owner from St. John's relocated her artisan art and jewelry store to Trinity. Indeed, some of her products are representative of Newfoundland landscapes, and symbolic of local culture (e.g. dory boats, cod bone earrings). Yet, Tina also exploited the relatively underrepresented market of high-end, high-quality items. As such, jewelry made from non-local



materials, which is generally located in finer jewelry stores, could be purchased from her venue. According to her website,

Stunning jewelry designs incorporate a variety of semi-precious stones including Labradorite, Swarovski crystals, hand-made beads, paired with rhodium plated pewter and .925 sterling silver for a timeless work of wearable art with many being one-of-a-kind designs (anonymous, 2017).

At least one rural in-migrant business resembled complete layering (i.e. did not engage in recombination). In 2012, Trinity's first specialty chocolate shop was founded. Newcomers, from Toronto, decided to extend their 30-year old parent company in Ontario, to accommodate a foreseeable market in rural Newfoundland. They acknowledge that their products are not representative of Newfoundland cultural heritage. In addition to their confectionary business, the owners have recently (2016) opened an ice cream shop in a nearby community (anonymous, 2017). One counterurbanite couple contributed to the region's layering process with the exit of their B&B business, and the introduction of their marina, restaurant and art/craft shop. The final two examples mark a shift away from the cultural heritage-themed trajectory, and create a demand for innovation within existing firms. The rationale is that path-extension forces established firms to remain competitive within the marketplace. To do this, proprietors engage in conversion of their products and/or services, which results in path-renewal (Brekke, 2015).

### **6.4.3 Conversion**

Research from Trinity Bight confirms innovation within the marketplace is underway. At least three of 17 counterurbanite firm owners/operators, who engaged in recombination, later converted at least some of their products and/or services by incorporating new unauthentic amenities. For example, the owner of a high-end inn first strived to align his business with authentic Newfoundland culture. His website suggests:

The inn's buildings reflect traditional architecture in this rural region...Our building and interior reflect the tangible and aesthetic heritage of Newfoundland...Newfoundland is undergoing an economic and cultural renaissance that interests our guests...Tourism works best when it's culturally, not economically driven. Economically driven tourism is an industry where "place" becomes "brand", "experience" becomes "product" and so on (anonymous, 2017).

Despite this approach, the inn targeted those who enjoy upscale, luxurious food and accommodation. As such, two years after he opened a B&B, Gary constructed an inn and

restaurant that caters to high-end clientele. In addition, the market demand has resulted in his decision to add a conference centre adjacent to the inn. The Atlantic Canada Opportunities Agency referred to their new addition as a “state-of-the-art conference centre” (Atlantic Canada Opportunities Agency, 2013).

The addition of a professional sommelier and the development of a spa and wine bar, are also examples of conversion (path-renewal). In the first example, the owner boasted “we have the best wine list probably in the province” (personal communication, 2012). Looking to retire in the near future, the owner recruited her daughter to mentor and take over the family business. In her own words,

I didn't know what I was going to do because I am 66 and I am getting up there and in order to run this place the standards have to be high. I didn't know if I had enough energy... My daughter was going to go away and do her master's but she had someone tell her at one of the rooms one night that she would be a good sommelier...so she decided to do that...having her as a sommelier was what made us innovative and was able to make us unique and keep on growing without having to spend a lot of capital money (Tracy, personal communication, 2012).

As Tracy suggests, adding an innovative service helps to keep her “unique” in a landscape with evolving tourism amenities. Similarly, the daughter of a return migrant entrepreneur has plans to expand the family business to include a spa and wine bar. She, too, anticipated taking over the family business in light of her mother's retirement.

The examples above confirm the presence of layering (path-extension) and conversion (path-renewal). According to Steen and Karlsen (2014), conversion is linked to layering in that innovation is fundamental to business survival and resilience in regions facing stagnation. The relationship being, “Conversion processes interact with layering processes, such as when new firms employ novel technology or business organization, which in turn may have spillover effects on established local firms” (Steen and Karlsen, 2014, p. 135).

In Trinity Bight, recombination was the dominant process at the beginning of the tourism development trajectory. The introduction of the theatre in 1993-94 led to a sharp rise in visitors and the demand for innovative and unique accommodations and other tourism services (e.g. a diverse range of food venues). The literature indicates that conversion processes typically follow layering processes. To no surprise, this occurred in the region of Trinity Bight. For example, after the conversion of two existing B&Bs (in 1997 and 1999), to include luxury inns and restaurants, layering processes emerged with new non-conventional tourism firms. For example,

beginning in 2006, at least seven new tourism-related firms introduced non-cultural heritage products and/or services (e.g. hostel, chocolate shop).

In short, recombination is occurring in Trinity Bight's public, non-profit, and commercial sectors. Recombination was accompanied by layering and conversion; albeit, layering and conversion occurred at later stages of the region's tourism development trajectory, and was driven by counterurbanite business owners/operators. Because of these innovative processes, in-migrants are helping to avoid tourism trajectory lock-in, and engaging in neo-endogenous growth.

Therefore, it is clear that counterurbanites are contributing to neo-endogenous development by building on local place-based assets, through recombination processes. The addition of products and services that reflect clustering and layering, though, suggest that a shift is occurring in Trinity as business activity is diversifying. Next, is to determine whether or not counterurbanite business owners/operators are mobilizing local labour and building local capacity; other processes that reflect neo-endogenous development.

## **6.5 Counterurbanite Mobilization of Local Labour**

Tourism generated significant employment opportunities in Trinity Bight. Shown in Table 6.5, the industry produced roughly 200 jobs in the region in 2012. Local business owners created six of these jobs (3.0%). Additionally, the THS created approximately 45 (22.5%) employment prospects throughout the tourism season (Mayor of Trinity, personal communication, 2012)<sup>60</sup>. Counterurbanites generated 149 (74.5%) (140 full-time, seasonal; eight part-time, seasonal; and one full-time, year-round) employment opportunities; 116 (77.9%) came from newcomers, and 33 (22.1%) from returnees. On a per business basis, each counterurbanite generated approximately 8.7 employment opportunities. Of these employment opportunities, newcomers produced an average of 9.7 jobs, whereas returnees were each accountable for 6.6 hiring. Local business owners employed an average of three people. The following section explores rural in-migrant business owner/operator involvement in mobilizing the local labour market.

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<sup>60</sup> The THS was the second largest employer in Trinity Bight as of 2014 (The Packet, 2014a).

**Table 6.5** Local Residents Employed in Tourism in Trinity Bight

Employer	Full-time seasonal	Part-time seasonal	Full-time Year-round	Part-time Year-round	Total
<i>Counterurbanites</i>					
Newcomers	110	6	0	0	116
Returnees	30	2	1	0	33
<i>Others</i>					
Locals	5	1	0	0	6
Civic Sector	~45	0	0	0	~45 <sup>61</sup>
Total # of Jobs	~190	9	1	0	~200

Tourism is the largest employer in the Trinity Bight area<sup>62</sup>. One Canadian magazine claimed, “Had it not been for a theatre company, Trinity, Newfoundland might well have become a ghost town” (Creative City News, 2004). This is one of the reasons the region has been successful at sustaining a stable core rural population, albeit, the majority of people are seasonal residents (Researcher’s notes).

Counterurbanites were central to the success of maintaining Trinity Bight’s seasonal population. As shown above, they contributed to the majority of local jobs and, according to the Trinity Town Clerk and the Mayor of Trinity they produced the majority of tax revenues that helped sustain community services (e.g. bank, post office). This, in turn, resulted in further job retention (personal communication, 2012).

Newcomers created over half (58.0%) of all (200) tourism-related employment opportunities (Table 6.5). At the time of the fishing crisis, Bonnie was one of many stakeholders who aimed to diversify economies of rural Newfoundland and provide local jobs (personal communication, 2012). The establishment of her theatre led to the employment of approximately 40-50 staff per season. Her employees are paid from theatre’s profits, but, also, subsidized from government grants. Government subsidies are necessary because,

...you are not going to pay for all that [employee payroll] with the box office, our box office is pretty significant, I think it is the highest in the province, or of any of the festivals, it is fairly significant, but it is not, it will not itself pay for all of that, I mean the payroll alone is \$350, 000 to \$450, 000. It is a big payroll and people are paid more than minimum wage (Bonnie, personal communication, 2012).

<sup>61</sup> Indicates approximate number of jobs.

<sup>62</sup> Rising Tide Theatre was the largest employer in the region as of 2014 (The Packet, 2014a).

Bonnie also found it important to hire local Newfoundlanders and, according to her comment above, pay them more than minimum wage. Although a downside to tourism is that jobs are seasonal, an upside, Bonnie suggested, is “pay is a lot better than you are getting in a lot of these places that are spin-offs from tourism” (personal communication, 2012). Moreover, she implied that all of her staff may not be local to Trinity, but they were local to Newfoundland. In her own words, “it would be very unusual for someone to not be from Newfoundland...and it is not that I would not hire from outside, but I really do try to hire people who are living in Newfoundland or who are living away, but are from [here]” (personal communication, 2012).

Returnees also aspired to provide local opportunities. Shown in Table 6.5, rural returnees provided 33 (16.5%) of all (200) tourism-related jobs in the region. Returnees, however, appeared to have slightly different outlooks on local employment. In other words, at least two returnees, who contributed ninety percent of all returnee-produced jobs, had personal reasons for providing employment to local residents. Furthermore, it appeared that returnees had a deeper connection to community members, because of personal ties or their ability to relate to their struggle. For instance, Lorain explained that by opening her business,

...all of these people [local residents] would get enough money to qualify for unemployment and not have to move away. That was one of my biggest rewards, was people like [name omitted] one of my employees here, her husband was out of work, the shipping yards had to close down here, it used to be the thriving community and they had to shut down and people had to move away. Some of them are now coming back, but people had to move away. Some of our older staff down there, the reason they are here is because their husbands had to move away to make money and they stayed here to raise the kids. They got enough money to work here in the summer and stay in the winter and not have to move away and hopefully they enjoyed working [here] because I was happy to have them (personal communication, 2012).

On average, Lorain employed 20-22 people from the region. She also found that employee profits are put back into the local economy, which is beneficial for community services and other businesses (personal communication, 2012).

A newcomer shared similar thinking in regards to benefits that extend into the community from local employment. Cindy suggested that when tourism-related businesses benefit from tourists, so do non-tourism related firms. For example, many tourism firms are supplied products from local firms in the area. She explained this process further,

It has a trickledown effect. It is not just the people who are dealing with the tourists, like the supermarket, when [name omitted] is really busy in the summer time he

employs more people, and then it enables them to earn their hours so that they can get their E.I. and spend winter here, instead of having to go away, so yah it is a big impact...we employ a lot of people (Cindy, personal communication, 2012).

Thus, the more locals employed at local firms (tourism or non-tourism), the more financial stability could be attained by non-tourism workers to live in these rural communities year-round.

Some respondents commented on government-funded financial incentives for business start-ups. These incentives are developed to generate local employment from the addition of new firms. For example, Tracy revealed that at “the beginning of the cod moratorium, the government said, o.k., if you can create jobs we will help” (personal communication, 2012). Yet, most government aid was in the form of interest-free loans or matching grants<sup>63</sup>. The most challenging aspect of grant money, Tracy argued, is that “it is a double edged sword because if you go into grant money for labour, then you really have a limited pocket of labour from where you can hire from. These people have to be on unemployment” (i.e. employment insurance—E.I.) (personal communication, 2012).

What Tracy was insinuating is that government funding is limited to the required amount of weeks for an individual to qualify for E.I. Therefore, when funding ran out (typically 10-14 weeks), local employees would file for E.I, leaving the employer with virtually no one to fill the empty positions. This concern was shared by other participants, and was particularly troublesome for those who strived to extend their operation into the shoulder months of the season (i.e. May-October) (Researcher’s notes).

Others also found problems associated with E.I. A newcomer expressed that she was “able to secure funding, but the people that apply don’t fit the criteria for funding. So that is a big concern”<sup>64</sup> (Cynthia, personal communication, 2012). Also, many found it difficult to find and/or retain summer staff. Some even suggested that locals are not interested in working in the tourism industry (Researcher’s notes). Additionally, the owner of an artisan jewelry and art store indicated that, in that year, she received two summer student grants. The obstacle, she argued, is

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<sup>63</sup> Matching Grants are provided through the provincial government, and are awarded to recipients based on the condition that the company matches contributions (Government of Newfoundland and Labrador, 2017, <http://www.releases.gov.nl.ca/releases/2017/btrcd/0720n02.aspx>).

<sup>64</sup> Provincial and Canadian employment funding programs set criteria for becoming a successful recipient. Some of these criteria apply to enrollment in high school or in a post-secondary institution, along with particular development skills that are deemed suitable for funding (see Department of Advanced Education, Skills and Labour, Government of Newfoundland and Labrador, 2017).

“it is difficult having seasonal staff. I mean these people could be working full-time somewhere else permanently” (Tina, personal communication, 2012).

Despite the challenges that business owners/operators face with E.I, the majority argued that it is a necessary system for the survival of rural areas (Researcher’s notes). By way of illustration, a total of 12 of 17 counterurbanite business owners/operators expressed anxieties about the sustainability of rural areas, with respect to seasonal workers. At the time of this research, proposed changes to E.I stipulated that able people would be required to seek full-time work if it was within 100km (or an hour drive) from their residence (Newfoundland and Labrador Employers’ Council, 2012). Although the issue was complex, if E.I legislation were to change, many feared they would lose the majority of the local workforce pool. For example, one business operator explained,

I don’t know what’s going to happen with people in the region, in the area, it is a concern, because basically they are saying you are going to have to go out and find other work. And say if you live in Trinity, [you] now have to drive to Clarenville to work in a restaurant or something that is an hour away, and that is gas money each week...if you get a job then you can’t come back, according to E.I rules...what is the end game? Is it that there will be no more seasonal workers? Because if that is the plan, then you ought to just put that up on a billboard somewhere so that all of these rural communities can just shut down immediately (Bonnie, personal communication, 2012).

She, too, expressed her fear that some of her staff “would be forced to take a minimum wage job instead of working here at the theatre” (Bonnie, personal communication, 2012). Nonetheless, tourism-related employment was the main source of employment for most local residents. Counterurbanites are a major contributor to the number of available jobs in the region. Yet, the creation of employment opportunities is only one of the ways that rural in-migrants contribute to neo-endogenous development. As such, the next section explores how rural in-migrants impact local capacity building.

## **6.6 Building Local Capacity**

Described in Chapter 2, ‘capital’ can manifest in the form of social, cultural, and financial resources<sup>65</sup>. From this, economic capital may be accumulated over time and influence the local development trajectory. Trinity Bight counterurbanite business owners/operators are

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<sup>65</sup> Forms of capital are not limited to categories such as social, cultural, and financial.

contributing to neo-endogenous development via social (e.g. strengthening local networks, volunteering), cultural (e.g. enhancing skills and knowledge), and financial (e.g. injecting money into the community, facilitating local wealth generation) capital. Their contributions have resulted in an innovating branching economy as seen earlier, through the processes of recombination, layering, and conversion. Examples of extra-local capital are presented in the sections below.

### **6.6.1 Social Capital**

Research found that counterurbanites generate social capital through volunteering, strengthening local networks, and community building. With respect to volunteering, 17 rural in-migrant business owners/operators were asked whether or not they belong to any local organizations or engage in civic sector activities. Findings reveal that 10 out of 17 counterurbanite business owners/operators were involved in at least one volunteer-related activity. Some of these organizations or activities include: the THS (5), Town Council (4), the Discovery Trail Tourism Association (DTTA) (3), the annual Summer Festival (3), the Library Committee (2), the Heritage Advisory Committee (HAC) (1), Fire Station (1), St. Paul's Anglican Church (1), and the Skerwink Trail Committee (1). Interestingly, the majority (8/10) of those who volunteered are newcomers (2/10 are returnees). Below are examples of rural in-migrant participation in volunteer activities.

Discussed earlier, the THS is a non-profit organization comprised of volunteers that promote, preserve, and protect the historic village of Trinity (and surrounding region). This civic organization had more counterurbanite members than any other volunteer group in the region. Philip, the owner of a Trinity-based café, is the President; following in his grandfather's footsteps (personal communication, 2012). Philip is also a member of Town Council. In both respects, Philip is very active in the community, which was observed through his advocacy for promoting local cultural heritage. His leadership role in the launch of the Wooden Boat Museum to celebrate the 50<sup>th</sup> anniversary of the THS, illustrates his support for local community events (The Packet, 2014b). Others, including three newcomers and one rural returnee, served on Town Council.

Two business owners/operators (one newcomer and one returnee) belonged to the DTTA. The DTTA is a local volunteer, non-profit organization that partnered with governments to



promote tourism on the Bonavista Peninsula (Development and Renewal Board, 1999)<sup>66</sup>. In the late 1990s, the DTTA had a membership of 90 small-business operators, municipalities and development organizations. The DTTA consists of five geographic areas: Bonavista, Plate Cove/King's Cove, Trinity, Port Blandford and Clarenville/Southwest Arm (Development and Renewal Board, 1999).

Rural in-migrant business owners/operators also participated at local events. For example, the annual Trinity Festival is comprised of local and non-local volunteers (Trinity Town Clerk, personal communication, 2012). The Mayor of Trinity described non-local (i.e. counterurbanite) participation as such,

...you will see some of the seasonal residents step up and take a turn at the BBQ and there is a cake walk that they do for some of the senior citizens over at the Parish Hall and the seasonal residents will bake a cake so that they can be a part of the cake walk. We have a fundraiser for the [Trinity] Historical Society, they will be there to bring food to the table, they bring items that we can auction off to raise money. They have a strong sense of community spirit and they enjoy being active in the community just as much as the local residents do (personal communication, 2012).

Aside from volunteering, some counterurbanites pursued their own initiatives to promote the community and regional economic development. For example, Rising Tide Theatre has been praised for its contributions to the community, and the “economic impact [that] goes beyond the small town of Trinity to the entire province” (Nova Scotia Tourism Human Resource Council, 2009). This newcomer's commitment to social development was also apparent. According to a report from the Government of Newfoundland and Labrador (2004),

Through the Rising Tide Theatre Company, [Bonnie] has provided a vibrant showcase of the culture and heritage of Newfoundland and Labrador, particularly through her commitment to staging plays about the province which have been written by its residents.

Yet, her journey was “not easy” (Bonnie, personal communication, 2012). Bonnie confessed that “the idea of a St. John's theatre company coming to Trinity and starting something that would have legs and life was not something that as easily accepted”, if accepted at all (personal communication, 2012). Around the cod moratorium, Bonnie travelled back and forth from St.

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<sup>66</sup> The DTTA had 90 businesses in 1999 (Government of Newfoundland and Labrador, 1999; <http://www.releases.gov.nl.ca/releases/1999/drr/1217n0d.htm> ). Current statistics are unavailable as the organization no longer has a website, and has had declining membership in recent years (Researcher's notes).

John's to Trinity to establish her theatre company in rural Newfoundland. After the first year, she explained, "I decided I would come back and build the festival because I had gotten to know these people. We had gotten pretty close over the time and I really thought it was worthy of the venture" (personal communication, 2012). Her company worked closely with the local church and used their venue as a start-up location. They also worked with the Town of Trinity and THS to construct a permanent theatre in the Heritage District. After a few successful years, Bonnie shared,

I decided to move out year-round, because, I felt that was a challenge to that in a way because we were getting bigger, it was becoming more important to the region and the area, and community and that I felt that it was the right thing to do, that if, to live here year-round, it was an important commitment...Someone said to me, back then, who still lives in this area, you know, he said to me, 'communities are not communities if they only exist in the summer' (personal communication, 2012).

The example above illustrates Bonnie's level of commitment to become part of the local community. To become more integrated into the lives of local people, Bonnie decided to move out to Trinity permanently. She also consulted local groups to determine the best location and structure style for the theatre.

Community relationship building was visible from interactions with other newcomers. For example, community building was a by-product of a newly constructed hostel in the region. Seasonal counterurbanite sisters, from Australia, own and operate an accommodation venue that hosts travellers from all over the world. A map located in the kitchen contains thumb tacks that represented the origins of their visitors from as far away as Tasmania. In their 20s, the sisters are socialites within the region. They worked at other local businesses, and entertained locals and visitors at their abode. Their hostel acted as a self-proclaimed community centre, which facilitated communication, knowledge, and culture sharing. One of the sisters explained:

...this community doesn't have anywhere for the youth to hang out. Last year, we met a whole lot of guys and they would come over and have drinks and stuff and we asked them, where did you hang out before you came here? They said we didn't, they had no place to go. So this place literally became the place where people could come, who were legally able to drink, they aren't away, or the ones that have gone away and come back and they are trying to find their feet again in the community and this is somewhere that they can come and hang out and have fun and meet interesting people that are coming from away or whatever (personal communication, 2012).

The sisters would like to help create more social places for interaction between the community, seasonal residents, and visitors to the area. Though their initial motivation was to provide

affordable accommodations for tourists, they had come to value their hostel as a much-needed social space that “the community was missing” (Bethany, personal communication, 2012).

The hostel was not the only business that provided a space for social gathering. For example, Philip, a newcomer, opened a seasonal café that catered to locals, seasonal residents and tourists. Philip’s ancestry in the town of Trinity dates back over 300 years. His ties to the community, along with his participation in Town Council and the THS, appeared to facilitate his smooth transition into the community. With reference to Philip’s café, a fellow newcomer claimed that seasonal residents:

...interact with the locals just as much as locals interact with locals. They have what they call a breakfast club at 8 a.m. over at the [name omitted] coffee shop. Pretty much half of the seasonal residents are sitting around with locals all chatting. It is a mixture of people from St. John’s who have property and have come here for the past 30 to 40 years, a mixture of people from all over who have come and stayed, and a lot of locals. But a very big sense of, well you walk in and you say hello to someone you know every time. There is a real community here, a real sense of community. It is not just a tourism town where people show up to do their job or run their business and leave, there is a real interaction and relationships built (Tracy, personal communication, 2012).

Rural in-migrants also found it important to build relationships with other tourism businesses. For example, building community capacity was demonstrated through counterurbanite business networks. This was illustrated when Lorain, a return migrant, offered her facility to a newcomer in the early stages of establishing the theatre. Prior to having her own space, Bonnie utilized Lorain’s kitchen to prepare for their dinner theatre (Lorain, personal communication, 2012). The grand gesture did not go unnoticed. Once established, Bonnie repaid the favour to the local community, which was communicated by the Trinity Mayor,

Case in point, in 2010 when hurricane Igor went through...everybody came together...a number of them got together and did a Thanksgiving dinner... [Bonnie] gave up the theatre for an evening meal, the seasonal residents went to the Parish Hall and cooked and peeled and served about 200 people (personal communication, 2012).

Relationship building between counterurbanites was also demonstrated through business start-up advice. For instance, Cindy mentored owners of other cafés and similar eateries that were trying to establish roots. Cindy extended this gesture to local counterurbanite business owners/operators, as well as one located over 200 km away (café 3 below). As one of the first

cafés in the area, Cindy was sought for assistance from at least three other entrepreneurs. Below are three examples she shared,

...when [café 1] was thinking about opening up his business he came and talked to us and picked our brains about what works, where to go for this, where to get your teas and coffees. So now we can send people to him. Last year we were making pizzas. Every Thursday was pizza night and thank God we don't have to do that anymore we can send them to [eatery 2] and they can eat pizza and look at the ocean... [café 3] use to come here a lot, like every summer...she was so excited to find us and then, she asked me if I would go and stay there for a weekend and give them some advice on setting up (Cindy, personal communication, 2012).

In these three instances, Cindy helped soon-to-be enterprise owners with start-up advice, and through exposure via referrals of her own patrons.

In short, rural in-migrant social capital contributed to building local capacity through volunteering, strengthening relationships between newcomers and locals, building community spaces to facilitate newcomer and local interaction, and networking to assist others aspiring to start their own business. Next, examples of the impacts of rural in-migrant cultural capital are provided.

### **6.6.2 Cultural Capital**

Cultural capital is measured according to rural in-migrant's level of education and exposure to urban environments (e.g. diverse cultures, nodes of information). The accumulation of cultural capital contributes to rural in-migrants' know-how. Know-how is determined by the ability to see economic opportunities from a newcomer's or returnee's perspective.

Extra-local cultural capital contributes to the region's business diversification. It is also beneficial for promoting and marketing the region as a tourism destination (Trinity Bight). Many rural in-migrant business owners/operators also use their cultural capital to enhance local skill building and knowledge through employment. This is illustrated further by way of examples. But first, counterurbanite cultural capital is described below.

Some counterurbanites gained urban living experience through attending a post-secondary education in metropolitan areas. The results reveal a highly educated and affluent cluster of counterurbanite business owners/operators. For example, 17 rural in-migrant entrepreneurs held a total of three PhDs, two master's degrees, six bachelor's degrees, three

college diplomas, and one high school diploma. Two respondents did not specify their level of education. Table 6.6 illustrates newcomer's and returnee's highest level of education.

**Table 6.6** Counterurbanite Business Owners/Operators Highest Level of Education

Level of Education	Newcomers (n=12)	Returnees (n=5)
Graduate degree (Ph.D. or Master's)	3	2
Bachelors	5	1
College/Trades	1	2
High school	1	0
Unknown	2	0

Table 6.6 shows that newcomers held higher degrees on average when compared to returnees (newcomers held three PhDs vs. returnees held two master's degrees). However, the majority of newcomers and returnees held a college degree or higher (~14 or 82.4%). Those that did not reply (2) held professional careers prior to moving to Trinity Bight, indicating a certain level of knowledge attainment. For example, Max, the owner of an art and antique map gallery, is a retired United States Diplomat for Foreign Services (personal communication, 2012).

Cultural backgrounds and birthplace origin contribute to counterurbanite cultural capital. For example, a number of newcomers (4) are originally from Europe (three from England and one from Holland). Tracy, a seasonal newcomer, insisted that "having a European background and having seen it through European eyes, I immediately knew that this place was very special" (personal communication, 2012). Around the time of the cod moratorium, Tracy recognized the need for high-end amenities,

...people were coming and just offering a spare room to sleep and a washroom outside and buddy up the way would offer a fishing boat...coming from Europe and having European parents who were very picky and standards were used, so I had more of a sense of what tourists would be looking for (personal communication, 2012).

When discussing Tracy's plans for creating her living museum B&B, she continued to explain,

I had really brought that [idea] from Holland. There is a little town in the centre of Holland, the size of Trinity, where over the past 70 to 80 years, they have reconstructed everything by hand, churches, townhouses, farms etc., and it is like a walk through the ages. We used to go there on school trips when I was only like 12 years old and it always intrigued me. So when I came here, I thought, why don't I do that? You always see opportunities, especially when you are not from the area (personal communication, 2012).

A European cultural background also influenced Gary. Gary was born in England but moved to Canada in adulthood. He returned to Europe for a short-period of time while his wife was on sabbatical. While away, he stated, “we stayed in rural places like this in Ireland and Scotland and so on, so this [his business] sort of fitted our taste buds” (personal communication, 2012). As such, both Cindy and Gary used their cultural knowledge to create their tourism business. They are both successful at creating firms that diversified Trinity Bight’s commercial sector and enhanced the tourism destination.

Having roots outside of Canada provided others with insight into gaps in the marketplace. For example, university educated sisters from Australia visited Trinity on vacation only to find a lack of accommodations. What is more, affordable accommodation for those looking for low-key, nature-based lodging, were practically non-existent. Because Newfoundland does not recognize hostels, they had to gain approval from Canada Select before the provincial government would issue a business licence. In order to register, they “had to jump through hoops to get a licence”, only to be awarded B&B status (Victoria and Bethany, personal communication, 2012). Clearly, the sister’s capacity to achieve this is attributed to their high level of aptitude (cultural capital). They made reference to others in similar situations as themselves; “the very wealthy families that are in this community were not born here, they have been here for a long time but they were not born here. People from away have seen the opportunity here and decide to capitalize on it” (Victoria and Bethany, personal communication, 2012).

As such, these three examples demonstrate the benefits that extra-local cultural capital can have in the establishment of innovative tourism accommodation *services*. The introduction of innovative products is also a result of counterurbanite cultural capital. For example, British expats Cindy and Chris also recognized a gap in the tourism industry. They had been travelling to Newfoundland for several years on vacation and become aware of the lack of healthy food options. In their own words,

...[we were] coming here for about six years before we decided we really wanted to move here. So we looked at what it is that we miss here, and we are vegetarian, and so we found it very difficult to find good quality light vegetarian food and decent coffee. We thought, o.k., let’s provide it ourselves and see what happens (personal communication, 2012).

They bought a piece of property with a small shack, and spent two years restoring it into a business. Aside from providing healthy food options, part of their business strategy is to expand their hours of operation into the shoulder season. The reasoning for this being,

....people arrive in April expecting to see an iceberg and a whale, and lines full of washing, and wonderful people walking around and nowhere is open. All of the government places are still closed. Very few bed and breakfasts are open. So we open in April and we get people coming through and they are desperate for somewhere to stay, desperate for something to do (personal communication, 2012).

The ability to see opportunities from an outsider's perspective played a role in Tracy's and Bonnie's success. More importantly, both newcomers demonstrated the transfer of job skills and personal knowledge, which increases the capacity of residents to: a) open their own business, and b) advance their careers in other avenues. For example, Tina's transfer of cultural capital is evident from her statement below,

...right now, I have been really lucky, I have an amazing apprentice working with me in Trinity that I have trained who had no clue, had never picked up a pair of jewelry plyers in her life but I knew she would be good at it...she grew up in Port Rexton, so she was local, I had her for two years but now don't have her because she is expecting twins. I have to find someone else. But she does a lot of the work in the studio. I set up a small studio in the studio for her to work. I took her under my wing, she didn't have a clue, and now she makes her own jewelry (personal communication, 2012).

Bonnie's contributions to skill development and career advancement are unparalleled to other counterurbanites. Her theatre consistently employed the highest number of locals in the region in above average wage positions, such as acting, writing, directing, and costume design. Many of her performers go on to professional acting careers (Bonnie, personal communication, 2012). The transfer of skills and knowledge can also lead to financial benefits for local residents. This idea is returned to in Section 6.6.3.

Business owners/operators also used their cultural capital to promote private and civic-led activities. A total of 12 counterurbanite respondents indicated that one of their motivations is to promote the region. As such, many not only promoted the community but also other businesses and volunteer-based organizations. For example, Tracy designed a town website that offered information regarding local tourism-related activities (e.g. whale watching) and places to dine and sightsee (e.g. historic sites). Her novel idea is described below:

I created a website. It is the best one in the area. We have a skillset and we can afford to do it where lots of local smaller businesses can't afford to do so or have the skillset to do so...if you go to our website you see years of promoting the whole community...there is no question that in some way we are stimulating the economy (Tracy, personal communication, 2012).

At least 10 other counterurbanites promoted the private and civic sector via distributing or displaying brochures and through word of mouth.

Return migrants, too, used experiences from living outside of Newfoundland to create their enterprise. For example, upon Lorain's and Charles's return to Trinity, they were surprised at the shortage of local B&Bs. Lorain explained that "Trinity, at this point, was a historic town, but there was no reason for anyone to stay here. They would drive down and drive out" (personal communication, 2012). The couple had stayed at several B&Bs over the years while travelling. This led to the conclusion that "people would actually pay money to come here and stay overnight. There was virtually nowhere to stay" (personal communication, 2012). With this in mind, the couple restored a 19<sup>th</sup> century home into a B&B.

Another returnee gained business know-how through travelling experiences. Upon realizing the value of spreading local history, Berry thought to himself "why don't I start a walking tour because I have done a lot of walking tours in other parts of the world. I figured there wasn't one here so I thought it was needed" (personal communication, 2012).

In short, newcomers reported a greater number of examples of cultural capital than their returnee counterparts. Perhaps this is due to the significant European presence among Trinity Bight tourism entrepreneurs. Nonetheless, the impacts of extra-local cultural capital were visible from both types (newcomer and returnee) of counterurbanites (e.g. skill and knowledge transfer, innovation of tourism businesses). What is more, skill and knowledge transfer, and innovative tourism products and services, extended local capacity building by way of financial capital. Examples of this follow.

### **6.6.3 Financial Capital**

Counterurbanite financial capital is determined to have impacted the community in two ways: individual and community wealth generation. Rural in-migrant investments in new businesses provided financial benefits to local residents through employment, transfer of knowledge and skills (i.e. facilitate wealth generation), and storefront access to sell their



products (i.e. facilitate wealth generation). The community at large benefits from an influx of extra-local financial capital through restoration efforts and development. Below, are examples of how counterurbanite financial capital impacted local capacity building in Trinity Bight.

Described earlier, employment provided by counterurbanites offers financial benefits to residents of Trinity Bight. Yet, financial benefits to locals are also found in the form of over-hiring (to provide extra jobs) and remuneration above minimum wage. More specifically, the results reveal that three of 17 counterurbanite business owners/operators employed more staff than necessary. The reasoning for this was explained by one newcomer,

...we had nine staff...we didn't need nine staff but they desperately needed unemployment stamps...I used to find work, they would be painting the floors, painting the ceiling, counting postcards, just to make work...we felt good because we were helping them...when you look back and think how much money we could have made if we didn't have to pay all that money in wages...but you couldn't see these people suffer. If they couldn't get E.I, what would they do? (Nancy, personal communication, 2012)

In addition to providing surplus jobs, counterurbanite financial capital contributed to higher wages. For example, six out of 17 in-migrant businesses owners/operators paid their employees' wages that are above provincial requirements. This is demonstrated from Bonnie's interview where she indicated that her employees are paid higher wages compared to those found at other tourism jobs. Because it is hard to find local residents who could afford to survive on tourism wages, Kim resorted to increasing her staff salaries; "I am probably paying my staff more than I should be based on the work that I have" (personal communication, 2012). However, that had more to do with accommodating employees than the belief that higher pay was warranted. This was assumed from Kim's comment; "We either need to grow the business or hire more staff, but you can't hire staff full-time here, if people don't get their unemployment they can't afford to stay because there is no year-round work" (personal communication, 2012). According to her statement, counterurbanites possessed surplus financial capital that benefited locals in terms of higher wages, and, their ability to qualify for E.I during the winter so that they could remain living in their rural community.

As such, rural in-migrant financial capital, combined with cultural capital (e.g. knowledge, skills), is important for increasing local capabilities and retaining local populations. Some Trinity Bight residents learned skills that helped them to earn financial capital outside of their employment in tourism (e.g. professional theatre). Surplus financial capital also benefited

local residents as seen by some who were earning above average wages and acquiring jobs that were not necessarily required.

Counterurbanites also facilitated local wealth generation through the promotion of local businesses and products and/or services. For example, three of all rural in-migrants used their floor space to sell locally-produced artwork and handcrafts. The use of this space enabled local residents to sell their products who would otherwise have limited opportunity to do so (e.g. store-front, marketing ability). An example of this was revealed while speaking with Gary,

You see all the artwork that we have hanging here? It is done by artists who couldn't sell it. We have 270 pieces and it is the largest art gallery in the province...all done by locals in the province. We sell the stuff, about \$20, 000 to \$30, 000 a year which is not a lot but the artists keep 100 percent. The reason for this is that we get the benefit of hanging it...it is great because it helps the art community and it helps us because I couldn't afford to put up 270 pieces of art (personal communication, 2012).

Another business owner offered business space to local artists, craftsmen, and musicians. She described this relationship as such: "We have a person who makes jewelry from found objects, clay pipes, and beach glass, all local, we try and promote local crafts and we have music events through the summer" (Cindy, personal communication, 2012). Sourcing local products was also mentioned as good practice to owning a local business. Seven of 17 counterurbanite interviewees suggested that it is highly important they buy their supplies locally. One newcomer purchased:

...as much local produce as possible. So for example, in the next week or so, I will have people bringing berries, we buy berries from local pickers and we will fill the freezers, it is really important. All of our vegetables are coming from Lethbridge, there is no one closer who does organic vegetables, so the guy comes twice a week, so we get all of our produce from them, otherwise the greens are in my own greenhouse or I have a neighbour who grows greens for the salad. It is as much as possible local (Cindy, personal communication, 2012).

In the examples above, counterurbanites facilitated wealth generation for residents via selling their products and purchasing supplies locally.

Finally, the accumulation of counterurbanite financial capital resulted in historic preservation and amenity sustainability/development. For example, at least three entrepreneurs undertook major restoration projects of structures to host their tourism business. Tasks included renovations and repairs to a number of historic homes and landmarks, such as Campbell House and the local wharf. Tracy's living B&B museum, Campbell House, is a product of government and personal

investment that led to its restoration, and recognition as a Provincial Heritage Structure (Heritage Newfoundland and Labrador, 2016a).

Bonnie's theatre is another example of counterurbanite financial capital that contributed to the reconstruction of local heritage. Her theatre was (re)built based on blueprints of the old Fish Store # 2 owned by historic resident Benjamin Lester (Town of Trinity, 2017a; Trinity Historical Society, 2014e). In the 1960s, the THS fought to halt the destruction of the iconic building. Though they were not successful, local residents took measurements and photos of the structure, along with whatever physical pieces they could salvage (e.g. doors, windows), with the anticipation that someday the structure could be rebuilt (My Trinity Vacation, 2017). Luckily, Bonnie's financial capital, as well as her desire to reconstruct the iconic building, answered the wishes of the local community.

In addition, the Trinity Mayor and Town Clerk stressed the importance of extra-locally generated property taxes for the sustainability of local provisions. For example, the Town Clerk explained: "When I came here eight years ago we, didn't have property taxes. We were just in the stage of putting water and sewer in. We had to put in property tax after the water and sewage" (personal communication, 2012). Rural in-migrants are largely responsible for the town's increased tax base. A seasonal business owner added that taxed generated from counterurbanite businesses help support local infrastructure. He indicated that "up until six years ago, there was no water and sewers here. The only reason that there is water and sewers is because of tourism" (Berry, personal communication, 2012). Rural in-migrants, as demonstrated throughout this chapter, account for the majority of the region's tourism development.

Counterurbanites also contributed financial capital to support local events. According to the Mayor of Trinity, seasonal residents participate in community events, such as the THS fundraisers (personal communication, 2012). The Trinity Town Clerk supported this notion, stating "a lot of our seasonal residents contribute very much to the community. Our seasonal residents are very involved in the community!". Without tourism, she added, it is unlikely the town of Trinity could retain services, such as the bank, drug store, and post office, among others (personal communication, 2012).

It is concluded that rural in-migrants injected financial capital into the community. This financial capital accounted for the preservation and reconstruction of built heritage, as well as sustaining of local services. Local residents were also able to benefit from extra-local financial

capital. This was seen through employment and the opportunity for locals to sell their products at (e.g. artwork), and to (e.g. fruits and vegetables), counterurbanite businesses.

## **6.7 Conclusion**

In short, the civic sector in Trinity, comprise primarily of local residents, initiated the tourism path trajectory (i.e. path-creation). The majority (17/19) of tourism-related business owners/operators, however, are rural in-migrants, who spread into surrounding communities creating the tourism region designation of Trinity Bight. Newcomers represented the largest cohort of counterurbanites (12/17) compared to returnees (5/17). Community ties and lifestyle motivations were the most common responses from returnees for moving home and opening a tourism-related firm, respectively. In contrast, newcomers reported the desire to live a rural lifestyle, and profit-enabling (ability to afford their rural lifestyle) motivations for relocating and opening a tourism-related firm, respectively. Counterurbanites, though more newcomers than returnees, contribute considerably to path-extension and path-renewal, through layering and conversion. Also, rural in-migrants are responsible for creating almost seventy-five percent of local tourism-related jobs. Furthermore, rural in-migrant social, cultural, and financial capital greatly impacted the region; most notably, through skill creation, volunteer efforts, and enabling local wealth generation. The next chapter compares and contrasts findings from Brigus and Trinity Bight to extant literature, and redescribes and reinterprets results through abductive inference.

## **7 Abduction**

### **7.1 Introduction**

Critical realists claim that research aiming to define or hypothesise fundamental conditions “may to great advantage be organized as comparative studies” (Bergene, 2007, p. 15, see also Danermark et al., 2002). This is because case studies “are not selected primarily on the basis of the differences in outcome, but rather because the case manifest a common structure that the researcher wants to describe” (Bergene, 2007, p. 15). Having said that, the first half of this discussion (second half in Chapter 8) employs abduction, to redescribe research findings from both Brigus and Trinity Bight, “based on theories about structures and relations, as well as conceptual thinking” (Radulescu and Vessey, 2009, p. 6). This will assist in discovery of structural similarities and dissimilarities between the two study sites. Then, abduction is used as an inference to the best explanation, in what is described as a “dialectical movement between empirical data and theory, as, in seeking to explain an empirical event, this event is related to theory that in turn leads the researcher to new interpretations of the event” (Bergene, 2007, p. 20). These interpretations are presented as demi-regularities, which necessitate the second half of this discussion, which is presented as retroduction in Chapter 8.

This purpose of Chapter 7 is threefold. First, social and economic structures from Chapters 5 and 6 are highlighted and presented. Second, empirical findings from Brigus and Trinity Bight are compared and contrasted, to determine the conditions necessary to produce the outcomes found at both locales. Third, the conditions are redescribed using extant theories (e.g. rural development, counterurbanization, neo-endogenous, cultural heritage tourism) to determine demi-regularities through abduction that, in turn, possess causal powers. The process of retroduction, in Chapter 8, introduces demi-regularities, their causal powers, and the generative mechanisms that produce the observed relationship between the two.

### **7.2 Identifying Conditions and Structures in Brigus and Trinity Bight**

Brigus is a town of approximately 750 residents, located approximately 80 km from the province’s capital, St. John’s. Once predominantly path dependent in the fishery, post-cod moratorium the community experienced population decline and a shift in industry to include

tourism as an important economic driver. In contrast, Trinity is home to roughly 160 residents, and was once a hub for commercial fishing activity. The town is located further west of St. John's than Brigus, at an estimated 269 km. Trinity, too, has undergone significant restructuring and out-migration in light of declining primary sector activity, and has adapted well to tourism as a strategy of economic diversification. This is demonstrated in the formation of a cultural heritage tourism cluster known as Trinity Bight. Interestingly, civic sectors appear to be the drivers of path-creation at both study sites. The former finding is consistent with post-industrial communities found in the literature, which have resorted to tourism when confronted with primary sector path dependence (e.g. Carson and Carson, 2014; Hashimoto and Telfer, 2017; Ma and Hassink, 2014). Yet, civic groups, as drivers of new path-creation, have not been cited in the literature. Some similarities between the two communities are the commitment of civic sector groups and the chosen path of tourism development in the face of economic decline. Noticeable differences include the population size (Trinity is much smaller) and the geographic location (Trinity is much further from the urban core of the province).

Counterurbanization is discussed frequently in rural studies (e.g. Bosworth, 2010; Halfacree, 1994). It is best described as a population movement down the settlement hierarchy (Mitchell, 2004). The phenomenon is also important to our understanding of the types of people who engage in urban-rural migration, and to identify different residential histories (e.g. returnees, newcomers) (MacMichael et al., 2015; Mitchell and Shannon, 2017). In recent decades, an increasing number of studies draw attention to the impacts that commercial counterurbanites have on rural communities (e.g. Bosworth, 2009, 2010; Kalantaridis and Bika, 2011; Steel and Mitchell, 2017). In both Brigus and Trinity Bight, counterurbanites, newcomers and returnees, engaged in private-led tourism activities. Interestingly, this research finds an additional cohort of seasonal in-migrant entrepreneurs. Seasonal in-migration is commonly discussed in the literature (e.g. Gallent, 2015; Pitkänen et al., 2014), particularly, in relation to second home-ownership and tourism (Farstad, 2013; Lundmark and Marjavaara, 2013). Yet, seasonal in-migrant business owners/operators are largely underrepresented in academic texts. Another unexpected finding is the relative absence of local residents participating in tourism entrepreneurship. Here, one similarity between Brigus and Trinity Bight is the small number of local residents that own/operate tourism businesses. One major difference is the larger presence of seasonal in-migrant business owners/operators in Trinity Bight compared to Brigus.

Also worth noting is the geographic discrepancies between the two locations. More specifically, cluster formation of tourism activities is present around Trinity (i.e. Trinity Bight), but not Brigus. As a result of clustering, the region of Trinity Bight has become a top tourism destination, and has a high proportion of counterurbanite entrepreneurs, unlike Brigus. These results are thought to be unusual given the abundance of research that suggests there is less likelihood of small firm survival in peripheral areas with further proximity to urban centres (e.g. high costs, low accessibility, lack of local skills). In other words, the more remote a location is, the greater the challenges to entrepreneurship (Getz et al., 2004). In addition, studies find that urban adjacent rural communities attract greater numbers of counterurbanites than peripheral locations (Drozdowski, 2014; McIntyre and Pavlovich, 2006; Tonts et al., 2014). In the context of Newfoundland, this should indicate that regions closer to the provincial capital (i.e. urban core) are more likely to have greater counterurbanite tourism development. According to the results, however, this statement is not true.

In Brigus and Trinity Bight, evidence of in-migrant induced neo-endogenous development is visible in a number of ways: volunteering, community building (i.e. social capital), transfer of knowledge and skills, rural-urban networking (i.e. cultural capital), local job creation, and providing residents opportunities for wealth generation (i.e. financial capital). Results indicate that neo-endogenous development is more visible in Trinity Bight, which could be explained by the types of in-migrants in the region (e.g. seasonal, newcomer, returnee). As such, identifying in-migrant types might be important, since commercial counterurbanization is beneficial to path dependent, post-industrial communities, struggling to break free from locked-in development trajectories (e.g. Philip and MacLeod, 2018). Moreover, the greater presence of newcomers to Trinity Bight may play an important role in the renewal of their tourism trajectory.

### **7.3 Rural Development and Path Dependence**

Described in Chapter 2, are core concepts found in the path dependence literature. To refresh, path dependence is a term coined to describe the processes of evolving industrial landscapes (Martin and Sunley, 2012). Regions with industry homogeneity, often experience negative “lock-ins” when faced with limited innovation and resources to diversify (Brekke, 2015). Traditional resource trajectories may seek alternative paths if exposed to “external shock”, which can result from intentional (e.g. declining dependence on coal) or unintentional

(e.g. resource depletion) events (Brekke, 2015). Outcomes often generate “new radical innovation practices”, which lead to new path trajectories that resemble a region’s historic past (Brekke, 2015, p. 206). However, industrial regions are not destined to decline Underthun et al (2014) suggest, rather, their inherited resources, such as infrastructure, and labour force, can adapt and adjust (e.g. entrepreneurial innovation). New paths are dependent on “key mechanisms” (referred to in this thesis as processes), proposed by Martin (2012), which consist of recombination, layering, and conversion (p. 184).

For nearly a century, the economic conditions of Newfoundland reflected instability. Until the turn of the 20<sup>th</sup> century, the economy was largely dependent on fishing. Attempts at industrial diversification were largely unsuccessful, and the collapse of the Atlantic cod fishery in the 1990s, plunged the province into further economic despair (Schrunk, 2005). Lovelock et al (2010) discovered a similar scenario with the fishing industry on Steward Island, and Chatham Island, New Zealand. To combat decline, fishermen recombine natural and cultural resources for tourism-related projects to supplement incomes (e.g. boat tours) (Lovelock et al., 2010).

Similarly, isolated areas of Newfoundland were hit the hardest, experiencing massive out-migration and pecuniary stagnation (Schrunk and Roy, 2013). Brigus and Trinity Bight are two such regions that succumbed to negative “lock-ins”, stemming primarily from fishing industry path-exhaustion. In response to economic hardships, both regions were compelled to find alternative economies or inevitably decline. This is a difficult task, Hudson (2005) argues, as old industrial regions often become dependent on single-firm activities, and are vulnerable to “institutional thickness” (p. 621); thus unable to break free.

But, in Newfoundland, tourism has long been promoted as a regional development and diversification approach (e.g. Baum, 1999; Fife, 2004a; Fife, 2004b; Overton, 1979; Rockett and Ramsey, 2017; Seymour, 1980). To capitalize on the historical legacy of the outport, the provincial government pitched tourism as “turning the past into the future. Right here, right now” (Overton, 2007, p. 64). Creating multifunctional outports aimed to reduce negative perceptions of natural resource dependence; “Tourism was seen as a crucial instrument in this modernization process and was expected to deliver not only economic benefits but also new social attitudes” (Ashworth, 2003, p. 87). The result was the commoditization of two main resources: landscapes, and cultural heritage (Ashworth, 2003).



Rural commodification for tourism is visible in other parts of Canada. For example, capitalization of historic infrastructure is present in a tourism-orientated community of northern Ontario (Mitchell and O'Neill, 2016b). For Atikokan, a once mining-centred industrial region, economic transition began with mine repurposing for nature-based tourism (Mitchell and O'Neill, 2016b). Other examples of cultural commodification include the Anne of Green Gables tourist site in P.E.I (Squire, 1996), and heritage sport-tourism activities, such as the Canadian Arctic Winter Games (Hinch and Ramshaw, 2014). Though many cultural heritage and nature-based tourism activities are inspired by local community groups, studies of civic-led tourism trajectories are underreported in the path dependence literature. This gap provides an opportunity to explore this in the context of rural Newfoundland, where the civic sector plays a key role in at least two socially and economically transitioning outports.

### **7.3.1 Recombination: Civic Drivers**

In Brigus, economic transition occurred via adaption to, and innovative functionality of, cultural heritage assets, related to its industrial legacy. In the mid to late-1980s, local civic groups formed to combat problems tied to fishery path dependence. They initiated this through preservation of local historic infrastructure, and promotion of natural landscapes, for tourism. Projects, such as repurposing the historic Stone Barn into a museum, and later, renovations to St. George's Heritage Church, provided a platform that attracted external investment (e.g. counterurbanites, government funding). This comes as no surprise, since, in Canada, cultural tourism encompasses "built heritage", such as churches, historical landmarks, industrial developments, and archaeological sites (Bonn et al., 2007, p. 345). In fact, other academics discovered archaeology to be an asset for tourism development in other parts of Newfoundland (Fife, 2004b; Tuck, 1993).

Cultural attractions are also major tourism draws to rural areas, like Newfoundland's annual "Come-Home-Year" event (O'Brien, 1999). Establishment of the Brigus festival was pivotal to the town's tourism industry. The Blueberry Festival capitalizes on local assets, such as the community's signature berry, and represents local culture, through vendors selling Newfoundland handcrafts and food. Currently in its 30<sup>th</sup> season, the festival began as a community event that soon transpired into a yearly tradition. Attendees can enjoy the "folk festival, traditional NL music, crafts booths, pie eating contest, games of skill, Missed Blueberry

Pageant, adult outdoor dances, Newfie Night, parade, fireworks, traditional food”; a tactful recombination of traditions and cultural icons (Newfoundland and Labrador Tourism, 2017b). The event also recombines tourism with the town’s historic structures, by encouraging visitors to “Stroll the ancient streets and visit the Stone Barn Museum, Pinkston’s Forge<sup>67</sup>, Hawthorne Cottage, St. George’s Heritage Church and [the] Historic Tunnel” (Newfoundland and Labrador Tourism, 2017b). Everett (2007) confirms, the use of berries is “elemental in the province’s material tourism”, with reference to Newfoundland events such as the Blueberry Festival (p. 50).

Demonstrated above, civic-led new path-creation transpired prior to the 1992 cod moratorium. The BDA and BHSC combined, served as an economic catalyst to the region (e.g. Stone Barn Museum, Blueberry Festival). Some (2) private-led tourism amenities could be found prior to 1992 (e.g. café and B&B). Yet, the majority evolved parallel to the community’s growing popularity as a travel destination, which followed the entrance of the next civic group (*Baccalieu Players*). This civic activity is returned to later on.

Trinity Bight’s tourism trajectory evolved similarly, with a few key differences. The results show new path-creation beginning much earlier, starting in the late-1960s, with the founding of the THS. By the time of the economic crisis of the early-1990s, Trinity had a solid foundation of historic sites and visitor attractions (e.g. Museum, 1967; Interpretive Centre, 1991; Campbell House, 1991). Commercial development progressed similar to Brigus, with only a few (4) establishments opening pre-1992. One key difference in Trinity, however, was the presence of rural in-migrant business activity prior to the cod moratorium. Despite early signs of newcomers, the marketing of “Trinity Bight”, as a regional tourism identity, is the defining factor that set these two study sites apart.

Subsequent establishment of a theatre in both Trinity, and Brigus, furthered their tourism path trajectories. Local theatres stimulated economic development, and became staple attractions in both communities. Trinity was the first to welcome a theatre group. The Pageant began in 1993, followed by the addition of *Summer in the Bight*<sup>68</sup> theatre festival in 1994; eventually establishing roots in 2001, with the addition of a permanent structure. Introduced by a newcomer, the professional theatre company is the most celebrated attraction in the area, and is the crux of the region’s tourism industry (Atlantic Canada Opportunities Agency, 2012a).

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<sup>67</sup> Pinkston’s Forge was established after this research commenced (2014) (CBC, 2014).

<sup>68</sup> Renamed *Seasons in the Bight* in 2002 (Rising Tide Theatre, 2017).

In contrast, the *Baccalieu Players*, in Brigus, were formed in 1996 by a returning migrant. The community theatre group conducted plays similar to the Trinity Pageant, except they were performed entirely by volunteer actors. The theatre group discontinued the play around 2010, due to the lack of participants, and established a dinner theatre in a local community centre. Some Brigus residents pointed to the decline in volunteerism as a limitation to the theatre's continued success (Nick, personal communication, 2012).

In the examples above, recombination was used to create these theatrical performances. For example, Trinity's theatre re-enactments tell stories of the community's past and serve as a linchpin to the region's tourism identity. Also referred to as "anchor events", cultural attractions (e.g. festivals) are popular in peripheral rural areas because they are relatively inexpensive (Alves et al., 2010, p. 23), foster cultural clustering, reinforce community cultural heritage identity, and attract external investment (Getz, 1991).

In Brigus, only a handful of private (4: e.g. RV Park, historical walking tour), and civic (5: e.g. Wilcox Garden, Vindicator Park) tourism attractions, appeared post-theatre development (1996). For Trinity Bight, however, private (20: e.g. whale watching tour, hostel), and civic (10: e.g. THS Cooperage; Trinity Festival) tourism-related entities surged after the theatre was established (1993). Despite different development patterns, Brigus' and Trinity's local civic groups were the *drivers* of the tourism trajectory. They were vital to attracting anchor events, by creating a cultural heritage base for the theatres to build upon. They achieved this path through recombination of cultural heritage markers into authentic tourism products and services.

The literature framing path dependent industrial rural regions fails to acknowledge the role of civic groups as drivers of new path trajectories (Mitchell and O'Neill, 2016b). Rather, scholars tend to focus on the importance of innovative industries, such as technology (Williams, 2013), education and healthcare infrastructure (Tonts et al., 2014), and private-led entrepreneurial activities (Akgün et al., 2011; Bosworth, 2009; Carlsen et al., 2008; Lundmark et al., 2014), as drivers of rural diversification, along with some degree of institutional investment (e.g. government) (Mitchell and O'Neill, 2017).

However, civic leadership in path dependent city regions is well documented (e.g. Brooks et al., 2016; Hanson, 2009). In the metropolitan area of Kitchener-Waterloo, for example, manufacturing "lock-in" was overcome with the collaboration of stakeholders, such as the

University of Waterloo, the Canadian Technology Triangle (CTT Inc.), and Communitech (Wolfe, 2015). The formation of civic organization in the Region of Waterloo:

...involved civic entrepreneurs formalizing bonding ties within the high technology community and between local governments with the creation of Communitech and CTT Inc.... Today, CTT Inc. and Communitech have expanded their mandates significantly to their original designs, and function as the core associations in contributing to civic collaboration in the region (Wolfe, 2015, p. 202).

As such, greater attention to civic sectors as facilitators, initiators, or *drivers* of path-creation, particularly those of tourism trajectories, is necessary. Notably, the civic sector plays an important “bridge-builder” role between “three different institutional spheres that contribute to regional resilience: the private (firms), public (governments), and civic (networks and associations) sectors” (Wolfe, 2015, p. 195). They can also strengthen regional resilience as they are quicker than “slow-moving” governments to adopt and adapt to new economic and social circumstances (Wolf, 2015, p. 195). This is made possible because of “the social mechanisms which can foster more effective coordination among civic actors at the regional and local level” (Wolfe, 2015, p. 196). In other words, civic activities and community volunteering, facilitate in-person interactions of various groups with different life histories. They foster “social trust”, which can “further the ability of their members to influence public affairs” (Wolfe and Selle, 2002, p. 32). Community organizations are otherwise viewed as “the prime sources for social trust, horizontal social networks, and civic engagement, that is, social capital” (Wolfe and Selle, 2002, p. 32). If this is true, then the civic sector is particularly important for securing small business success, and “for peripheral regions in order to enhance learning, facilitate knowledge transfer, build absorptive capacity, and stimulate economic catch-up” (Booyens and Rogerson, 2017, p. 343).

Accordingly, civic groups, in at least these two rural Newfoundland communities, proved to be “bridge builders” between public and private sectors. Community groups acted as incubators of social capital, creating social relationships and building trust between local residents and in-migrant community members. Post-cod moratorium, government investment (public), in civic-led tourism-related projects, facilitated new path-creation (private and civic) from a production to consumption-led economy. Government funds were distributed to civic groups that demonstrated their commitment to tourism. This is especially true of the *Baccalieu Players* and Rising Tide Theatre, which created a demand for private-led tourism products (e.g.

walking tours), and services (e.g. accommodations). Examples of this next phase of the tourism trajectory are provided below.

### **7.3.2 Recombination: Spin-off Private Development**

Prior to the establishment of the Brigus theatre group, entrepreneurial activity in Brigus consisted of two cafés, and one B&B. All businesses recombined Newfoundland culture in the form of food dishes and/or handcrafted products. In Trinity, five privately owned businesses, which established prior to the theatre, also capitalized on the region's vital heritage via storytelling, serving Newfoundland culinary, and/or restoring historic structures to host tourism venues (e.g. B&Bs). With respect to non-local development, one return migrant entrepreneur was located in Brigus prior to the establishment of the *Baccalieu Players*. Conversely, two return migrant entrepreneurs, and, two newcomer entrepreneurs, established roots in Trinity before Rising Tide Theatre came to town.

For Brigus, more tourism-related ventures followed; albeit, very few. The town welcomed a total of five new businesses including: two B&Bs, two RV Parks, and a historical walking tour. All but one business (RV Park) used local assets as features of their business. This process of recombination involved business start-ups making use of old territorial assets (regional historic context), and combining them with new ideas that deviate from traditional industry (i.e. fishing to tourism) (Steen and Karlsen, 2014). Firm owners used décor (e.g. paintings), historic homes, food, and/or historic interpretation, as a method of recombining Newfoundland cultural heritage. According to Martin (2010), recombination involves “radical innovation”, which is clearly the case in rural Newfoundland. This has occurred through “a system of resources and properties [e.g. historic homes] that actors can recombine and redefine, in conjunction with new resources and properties [e.g. capital], to produce a new structure” [e.g. B&B] (Martin, 2010, p. 15).

The same is true for Trinity, however, development was not confined to the town's limits. The branding of the 1994 theatre, *Summer in the Bight*, was a regional marketing tool that placed the surrounding twelve communities on the map (Trinity Bight). From 1993 to 2011, a total of 14 tourism-related enterprises would find home in that area. Most (12/14) mimicked the existing tourism trajectory, and recombined local cultural heritage assets with aspects of their business. For example, a number of newer businesses (8/14) used local food ingredients (e.g. berries and

cod). Some (Sidali et al., 2015) suggest that this is becoming a popular strategy among rural tourism operators striving to fill niche food markets. Local food options appeal to the postmodern consumer because it:

...explores the meaning of local food, including the pursuit of reconnection with nature, resilience to globalisation, the role of local food in reinforcing personal identity, the search for freshness, taste and authenticity, support for local producers, and environmental concerns (Sidali et al., 2015, p. 1179).

In rural Newfoundland, Everett (2007) finds the use of local food as a strategy to promote the island. For example, “berries serve as an iconic image of resourceful people living close to a bountiful, welcoming wilderness” (Everett, 2007, p. 49). Furthermore, she suggests that the islands “wild berries and their utilization in diverse locally made products are highly regarded” (Everett, 2007, p. 49). Others (Steel and Mitchell, 2017) find evidence of in-migrant-led “heritage-themed food and/or accommodation” in rural parts of the Yukon, which is contributing to the territories place-based identity (p. 61). The same processes are used by in-migrants in this study’s sample. Non-local business owners/operators engaged in recombination of historic structures (e.g. wharf), as well as, the natural environment (e.g. whale tours), through heritage interpretation (i.e. historic tours and infrastructure repurposing) and showcasing local culture (i.e. entertainment and art).

It is clear, then, that local civic groups and private firms capitalized on the region’s ‘vital heritage’ to assume new path trajectories. Locally-constructed tourism infrastructure has attracted counterurbanites (newcomers and returnees) who find natural and cultural amenities favourable to business development. This finding mirrors that of Vuin et al.’s (2016) study, which suggests that rural regions, with a critical mass of tourism amenities, are particularly attractive to “amenity in-migrants” (p. 134). Shown above, some amenity and/or lifestyle migrants choose to open a rural firm. This has resulted in the formation of cultural heritage clusters, and furthered the tourism trajectory through the addition of innovative products and services.

### **7.3.3 Layering and Conversion**

Today, new industry (tourism) reflects the region’s cultural heritage and historic past (e.g. heritage sites, historical walking tours). In Trinity Bight, especially, tourism clustering offers a variety of cultural heritage products and services. Porter (1998) identifies a cluster as “a

form of network that occurs within a geographic location, in which the proximity of firms and institutions ensures certain forms of commonality and increases the frequency and impact of interactions” (p. 226). According to Stern and Seifert (2010), cultural clusters typically emerge organically as opposed to cultural districts that are associated with top-down approaches. For example, cultural districts are linked to externally-driven “big ticket” events (Stern and Seifert, 2010, p. 262). In contrast, cultural clusters require a greater understanding of cultural production and involve neighbouring networks and social relationship building (Stern and Seifert, 2010). In other words, cultural clusters are more likely to result in endogenous-based, long-term development.

This is true of Brigus and Trinity Bight with key events such as the Blueberry Festival and Rising Tide Theatre. However, to expand cultural amenities, regions must re-invent themselves, and diversify to prevent market saturation (Ivanovic, 2008). In path dependence literature, this typically manifests through layering processes via incorporating innovative non-traditional enterprise un-related to the current path trajectory. More specifically, layering encompasses “ongoing changes in the composition of a firm (or non-firm) ecosystem resulting from firms’ entry, exit, and survival” (Steen and Karlsen, 2014, p. 135).

In areas where cultural heritage tourism products become heavily concentrated, diversification is necessary to avoid path dependence ‘lock-in’ (e.g. Ma and Hassink, 2014; Müller and Brouder, 2014). Gartner (2005) argues that cultural heritage product saturation could “make future rural tourism development efforts focused on cultural/heritage attributes a risky proposition” (p. 37). Examples can be drawn from Trinity Bight’s tourism industry. Saturation of existing products/services (e.g. luxury inns) resulted in the arrival of new, non-traditional, spin-off firms (e.g. hostel that provided cheaper accommodation options). In contrast, Brigus’ tourism trajectory became stagnant. The extent of layering is limited to one tourism business (i.e. RV Park).

According to Steen and Karlsen (2014), “spin-offs spur growth and diversification of local economies, and are particularly associated with clustering processes” (p. 135). Lee (2004) asserts that tourism clustering is “rooted on the fact that the existence of a cluster that links businesses belonging to the tourism industry will revitalize the regional economy and allow the region to gain its competitive advantage” (p. 22). More specifically, clusters are central to the development of “localization economies” (Lee, 2004, p. 21) because they generate innovative

knowledge spill-over (Bernini and Guizzardi, 2016) and self-sufficiency, which “enables communities to retain a higher proportion of economic benefit and control over the activities that occur locally” (Cawley et al., 2002, p. 65).

Conversion was employed in both locations. In Brigus, path-renewal occurred at one return migrant’s café, where Bree extended her menu to include alternative dining options (e.g. gluten-free, vegan). Conversely, Trinity Bight displayed multiple signs of conversion. Many (5) businesses that initially engaged in recombination later pursued forms of path-renewal. For example, newcomer Gary first engaged in conversion when he added a luxury inn to his existing B&B business. Several years later, Gary’s business displayed signs of conversion with the construction of his ‘state-of-the-art’ conference centre. Another example of path-renewal is the addition of a sommelier to Tracy’s upscale restaurant and accommodation business.

Conversion implies change within an existing business. If businesses do not innovate, they become vulnerable to market competition (Steen and Karlsen, 2014). Spin-off firms are known to add diversity to the commercial sector, which, in turn, prompts existing businesses to restructure their products and/or services to remain relevant (Steen and Karlsen, 2014). Much like layering, conversion exists in cluster regions through innovation. However, tourism trajectories without renewed innovation are susceptible to outside ‘shock’ (e.g. climate change) (Luthe et al., 2012). Some argue that, if not developed properly, tourism can experience the boom and bust cycles like that of natural resource staples (e.g. fishing, mining, forestry) (Schmallegger and Carson, 2010). In other words,

...the way tourism is often set up in remote areas follows similar patterns as previous staples development: it is primarily based on natural resources, dependent on external and government mediation (for development, investment, marketing, and distribution), and highly susceptible to external market fluctuations (Schmallegger and Carson, 2010, p. 202).

Consequently, replacing primary sector activities with tourism can be challenging “in rural and remote areas as new industries are likely to pursue past patterns of development and simply replace one dependency with another” (Schmallegger and Carson, 2010, p. 203). However, some studies show that rural in-migrants add diversity and innovation to post-industrial communities (Carson and Carson, 2014; Steel and Mitchell, 2017; Tonts et al., 2014). As such, fewer in-migrants in Brigus could explain recent tourism stagnation and lack of innovation. To better



understand the impact of extra-local factors, the next section further unpacks the role of counterurbanites in rural Newfoundland.

#### **7.4 Counterurbanization**

Outlined in Chapter 2, counterurbanization is the migration of people down the settlement hierarchy (Mitchell, 2004). The desire to experience amenity-rich landscapes is a reason for this repopulation (Akgün et al., 2011; Vuin et al., 2016). This is true of selected communities of rural Newfoundland. For example, a report on the Town of Trinity asserts that with the rise in “the tourism industry, the Town has become popular as an area for seasonal residents” (Bishop, 2016). Similarly, a report on the Town of Brigus indicates that although the population is declining, “new houses have been built as increasingly Brigus becomes a popular location for vacation and retirement homes” (CBCL Ltd., 2013, p. 36).

This study found counterurbanites (compared to locals) own/operate most tourism-related businesses in both Brigus (6/9) and Trinity Bight (17/19). The majority of counterurbanite business owners/operators in Brigus are returnees (5/6). In contrast, the majority of counterurbanite business owners/operators in Trinity Bight are newcomers (12/17). The number of seasonal counterurbanites is much greater in Trinity Bight (12/17) compared to Brigus (1/6). No international counterurbanite business owners are found in Brigus. In comparison, six of 17 counterurbanite entrepreneurs who located in Trinity Bight had international origins.

There are many reasons why in-migrants chose to relocate to rural areas. Shown in Chapter 2, one category of movers is amenity-led lifestyle migrants. Lifestyle migration encompasses a variety of motivations, some of which include “lifestyle values” (Åkerlund and Sandberg, 2015, p. 353), “value added” amenities (e.g. sea kayaking in coastal areas) (Whitson, 2006, p. 491), and reasons that relate to family and/or ties to the community (e.g. rural roots) (Ní Laoire, 2007). The search for a better lifestyle (e.g. rejection of city life, work-life balance), is commonly associated with newcomers (Eimermann, 2015b; Patten et al., 2015). Not surprisingly, returnees are primarily motivated by familial/community pull-factors (Jones, 1999; King, 2000).

This study produced similar results to those found in the literature. The only newcomer to Brigus reported lifestyle (community ties) motivations for relocating. Similarly, almost all newcomers to Trinity Bight migrated for lifestyle reasons (11/12). However, in Trinity Bight,

lifestyle factors were mainly associated with the desire to experience rural living (9), rather than community ties (2). One newcomer reported economic opportunities as their motivation for moving to Trinity Bight. All five returnees to Brigus left their urban residencies for lifestyle reasons relating to family and/or community ties. Much the same, all five returnees to Trinity Bight did so for reasons relating to community ties.

In short, a few key differences were found between participants in Brigus and Trinity Bight. First, Trinity Bight had a higher number of seasonal, newcomer, and international, rural in-migrant entrepreneurs. Second, newcomers, who were motivated for lifestyle reasons, relating to a desire to experience rural Newfoundland, were present in Trinity Bight but not Brigus. Yet, one commonality between all counterurbanite participants in both communities is that they were more likely to own/operate a rural tourism-related business compared to local residents.

Bosworth and Farrell (2011) found that lifestyle in-migrants are commonly associated with lifestyle firms. According to the literature, lifestyle entrepreneurs are motivated by a number of factors (e.g. Peters et al., 2009), which are largely related to experiencing rural quality-of-life, pursuing a passion or hobby (Komppula, 2004; Saleilles and Gomez-Velasco, 2007), and for “fulfilment or social and moral obligations such as sustaining the natural environment or adding value to local communities” (Carlsen et al., 2008, p. 256). Analysis revealed that all six counterurbanites in Brigus (newcomers and returnees) reported non-economic lifestyle factors for opening their firm. Non-economic factors imply that participants are not financially dependent on their rural business. In contrast, newcomers to Trinity Bight were more likely to be motivated by economic-enabling (9) than non-economic (3) factors. Also in Trinity Bight, a greater number of returnees reported non-economic (3) than economic-enabling (2) lifestyle motivations. Economic-enabling factors indicate that business owners/operators require income from their business to support their rural move (temporary or permanent).

These findings suggest two things. First, returnees to Trinity Bight were less likely to depend on their business as a source of income, which determined whether or not they were able to migrate back to their hometown. Likewise, Brigus returnees did not report income as a factor when choosing to return to their community. Second, in Trinity Bight, the majority of newcomers relied on an income to enable their stay in rural Newfoundland. In contrast, the only newcomer to Brigus did not depend on income from her business. Also important to note is that,

five out of seven seasonal newcomers, and two out of five seasonal returnees, were dependent on income from their business to live part-time in rural Newfoundland. This indicates that seasonal migration is commonly enabled by profits from lifestyle businesses.

Lifestyle migration, defined by Benson and O'Reilly (2009), is “the spatial mobility of relatively affluent individuals of all ages, moving either part-time or full-time, to places that are meaningful because, for various reasons, they offer the potential of a better quality of life” (p. 609). As such, lifestyle migrants may include seasonal movers, but are not limited to any specific age group. Participants, in both Brigus and Trinity Bight, were post-secondary educated, from all age groups, both part-time and full-time migrants, and highly mobile. This topic is further explored later on.

The mean age of respondents in Brigus was 46 to 55 compared to 66 to 75 in Trinity Bight. However, there were at least six counterurbanites aged 45 years, or younger, in Trinity Bight. Yet, there were no counterurbanite entrepreneurs at, or under, the age of 45 in Brigus. Perhaps the absence of younger entrepreneurs in Brigus contributes to their non-economic lifestyle business motivations. In other words, the majority of rural in-migrant business owners/operators in Brigus were at, or near, retirement age. This is determined from studies that associate retirement-age with lifestyle migration (Åkerlund, 2017; Gustafson, 2001), and lifestyle entrepreneurship (Crawford and Naar, 2016; Tervo, 2014). Though the mean age is higher in Trinity Bight, the presence of at least six in-migrants, below retirement age (45), may account for their economic-enabling business motivations. Nevertheless, respondents' ages ranged from 18 to 76, or older. This broad range in age is consistent with Benson and O'Reilly's (2009) claim, in that lifestyle migrants are not necessarily determined by age. Yet, their decision to open a business may be influenced by their stage in life (e.g. afford rural lifestyle -- Peters et al., 2009).

Many scholars examine the characteristics of lifestyle migrants (Arsenijevic and Groot, 2017; Duncan et al., 2016; Stone and Stubbs, 2007). A review of academic writings finds that lifestyle migrants are typically middle-class affluent individuals, who lead relatively flexible schedules (e.g. work circumstances), and enjoy increased mobility (e.g. more free time) (Benson and O'Reilly, 2009; Eimermann, 2016). Increasing corporeal and social mobility, such as greater employment flexibility and access to higher education, could account for the high number of seasonal in-migrants found in rural Newfoundland, particularly in Trinity Bight. According to

Benson and Osbaldiston (2014), some lifestyle migrants are associated with “ongoing moves and multiple moorings that exist in an always-moving social environment” (p. 8). This suggests that seasonal lifestyle migration is linked to personal flexibility, such as employment or finances, which may otherwise act as social and/or physical constraints. Seasonal in-migrants, in Trinity Bight, were relatively affluent (e.g. education, worldly experience), had employment flexibility (e.g. summers off as a teacher, non-stationary workplace as flight attendant), and enjoyed financial freedom to live in rural Newfoundland (e.g. business profit-enabled, not business profit-driven). Lifestyle migrant entrepreneur mobilities have been thoroughly examined in the literature (e.g. Stone and Stubbs, 2007; Sun and Xu, 2017; Williams and McIntyre, 2012). Yet, those with seasonal (i.e. second home-owners) residential histories (e.g. international, domestic) are largely ignored.

For decades, rural Canada has experience increasing second home-ownership (i.e. cottages, cabins) (Wolfe, 1951). In the early-1940s, over eighty percent of cottagers in Canada were domestic-born; the remaining of American descent (Wolfe, 1951). By the 1980s, the demographics of vacation homes in Canada had changed. For example, Jaakson (1986) describes Canadian rural landscapes where “Americans make up a large portion of second-home owners” (p. 369). Growing tourism popularity in Newfoundland led to rising numbers of lifestyle migrants (Researcher’s notes). This trend is occurring in Trinity Bight, primarily, where at least nine newcomers reported visiting the province prior to relocating (seasonally or permanently). Today, international second home-ownership statistics in Canada are largely underreported. Though Halseth (2004) provides a comprehensive overview of second home (e.g. cottages, cabins) ownership in Canada, he restricts his research to domestic travellers. Given that five participants of this study originated overseas, Canada’s vacation home-ownership has likely expanded its international market.

Similar findings on the coast of rural Newfoundland are not out of the ordinary. According to Persson (2015), domestic and international second home-ownership in coastal regions has become commonplace. Furthermore, the “multihouse home” phenomena of the “twentieth century has contained also an explosion of modern mass tourism and vacation housing on national and international levels” (Persson, 2015, p. 49). Considering this, Lundmark et al (2014) find that “new mobility patterns through global tourism systems affect sparsely populated areas” (p. 422). These mobility patterns can be explained by things such as “growing

car ownership and access” to remote areas (Hall and Müller, 2004, p. 8). With respect to time-space constraints, Hall and Müller (2004) claim that “in an international context, long-distance second home ownership is still the exception” (p. 8). Yet, increasingly, second home-ownership is “not dependent solely on travel times”, but “also influenced by the geography of amenity-rich landscapes that concentrate at least purpose-built second homes within coastal and mountain areas...as well as making existing housing stock in such areas attractive for conversion to second homes” (Hall and Müller, 2004, p. 9-10). As such, increased mobility could account for the growing number of international and seasonal tourism operators in Trinity Bight.

Some studies illustrate the growing popularity of seasonal home-ownership in other parts of Canada. Though migrant origins are not specified, increasing numbers of seasonal migrants are relocating to the Canadian Rocky Mountains (Chipeniuk, 2004; Nepal and Jamal, 2011). According to Nepal and Jamal (2011), seasonal residents in mountainous regions of British Columbia provide economic benefits to local communities (e.g. high tax contributions); findings consistent with participants of this research. However, they also found that second home migrants rarely participate (attend or volunteer) in community-based events. For example, “several business owners in [the town of] Golden voiced concern that skiers and second home owners hardly come to town to eat or attend local festivals” (Nepal and Jamal, 2011, p. 98).

What is more, sparsely populated resort communities experience low levels of human and financial resources, and thus depend on volunteers to facilitate development projects and tourism planning (Nepal and Jamal, 2011). The results of this research are dissimilar. Seasonal migrants, along with permanent newcomers and returnees, were active participants in community-based civic activities. Moreover, in-migrant entrepreneurs created tourism-related employment opportunities, and used their externally-accumulated capital to further neo-endogenous goals. These findings are examined further below.

## **7.5 Neo-Endogenous Development**

In Section 7.3, civic sectors were identified as drivers of grassroots development (i.e. tourism) in two rural Newfoundland communities. However, most private-led development evolved from rural in-migrant entrepreneurs. Going forward, this section examines the impacts of these non-local entrepreneurs in Brigus and Trinity Bight.

At the turn of the 21<sup>st</sup> century, neo-endogenous development emerged, which “focused on the interface between the local and extralocal and the interrelationships between different forms of capital, namely cultural, social, educational, and economic” (Bosworth and Atterton, 2012, p. 254-55; see also Ray, 2001). As such, scholars became increasingly aware of the importance of in-migrant entrepreneurs in achieving neo-endogenous development goals (Bosworth and Farrell, 2011; Mitchell and Madden, 2014; Steel and Mitchell, 2017). In Brigus and Trinity Bight, government-enabled local development has been accompanied by in-migrant investment. This resulted in neo-endogenous forms of development, which have evolved unevenly in both communities. The following section compares in-migrant neo-endogenous influences (social, cultural, and financial capital) found in both communities.

### **7.5.1 Employment**

In the neo-endogenous literature, counterurbanite entrepreneurs are often evaluated based on their ability to create local jobs (Atterton et al., 2011; Bosworth, 2006; Kalantaridis and Bika, 2006). Bosworth’s (2009) study of northern England found that over half of small businesses were owned by in-migrants. He also found that in-migrants, on average, employed approximately ten percent of all north-east England’s local workforce (Bosworth, 2009). Others (Stockdale, 2006) point out that there are few employment opportunities at lifestyle migrant businesses due to high-rates of self-employment.

This research found that in-migrants create local employment, but not equally in both communities, nor between both groups of in-migrants (newcomers and returnees). In Brigus, counterurbanites employed half (10/20 or 1.6 employees each) of those working in tourism-related jobs. This equates to over three-quarters (10/13) of private sector tourism employment, compared to locals (3/13 or 1 employee each). The majority of migrant-related employment opportunities came from returnees (9/10 or 1.5 employees each compared to an average of one employee per newcomer business). In contrast, counterurbanites in Trinity Bight created approximately seventy-five percent of total tourism-related jobs in the region. Of all the jobs created from private tourism-related businesses alone, in-migrants accounted for the majority (149/155 or 8.7 employees each) compared to local proprietors (6/155 or 3 employees each). On average, newcomers (116/149 or 9.7 employees each) created more employment opportunities at their firms than returnees (33/149 or 6.6 employees each).

Overall, counterurbanite business owners/operators created more tourism-related jobs in Trinity Bight than Brigus (although there were more counterurbanite owners/operators present in Trinity Bight). There is one significant difference with regard to employment when both communities are compared. In Brigus, returnees provided more tourism-related jobs than newcomers. The opposite is true in Trinity Bight, where newcomers created more tourism-related jobs than returnees. It is difficult to compare newcomer and returnee-generated employment to the literature. Previous studies group newcomers and returnees as counterurbanites, and then compare the job opportunities they produce to local business owners (e.g. Herslund and Tanvig, 2012; Nelson, 1997). This study breaks employment down between newcomers and returnees to identify if either group creates more job opportunities.

A challenge that in-migrant business owners often face is the shortage of labour in remote and peripheral areas (Kalantaridis and Bika, 2006; Lundmark et al., 2014). This is because tourism is often seasonal, low skilled, and low waged, and thus undesirable (Lundmark et al., 2014). This research discovered other factors contributing to low supplies of local labour. For example, in Brigus, little local enthusiasm for tourism employment stemmed from the availability of full-time high-paying job opportunities in alternative industries in nearby suburbs or urban centres. In contrast, local residents in Trinity Bight were optimistic about tourism employment. Seasonal employment secured qualification for E.I. in the winter months, which enabled locals to live in their community year-round. Yet, restrictions placed on length of employment, to avoid E.I. disqualification, created obstacles for in-migrant entrepreneurs. Since the tourism season in Trinity Bight stretched into the shoulder months (e.g. May, October), employers are often left with few workers to fill empty positions.

Therefore, tourism-related employment was beneficial to residents of Trinity Bight. Counterurbanite entrepreneurs employed the majority of the population, which sustained the community's year-round population. Yet, E.I. benefits posed challenges to lengthening the tourism season since there was little incentive to work more than the number of government mandated work weeks (approximately 420 hours or 14 weeks<sup>69</sup>). The problem with labour shortages and E.I. in Canada has been acknowledged in seasonal industries. Lemieux and MacLeod (2000) suggest that in Canada, "there are a great deal of sectorial employment, such as

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<sup>69</sup> Government of Canada. (2017b). [http://srv129.services.gc.ca/rbin/eng/rates\\_cur.aspx](http://srv129.services.gc.ca/rbin/eng/rates_cur.aspx)

summer theatre companies, that permits the entry of businesses that survive because its employees are able to receive UI [E.I.] during the winter months” (p. 144). While the challenges experienced by firm entrepreneurs are realized (i.e. labour shortages), it has not been established whether changes to the E.I. system would impact the demand for labour (Lemieux and Macleod, 2000).

Rural Newfoundland and Labrador has the highest percentage (45.0% vs. Canadian average of 18.0%) of labour force residing in rural regions (Lysenko and Vodden, 2010, p. 3). This is because of seasonal industries enabled by E.I as a form of income subsidy as opposed to provision for the unemployed (Lysenko and Vodden, 2010). This is addressed in a positive light by Jolliffe and Farnsworth (2003), who argue that the federal E.I system “indirectly supports those firms that “embrace” seasonality by administering unemployment benefits to workers, often ensuring their availability as employees for the next summer” (p. 315). While this is found to be true, almost exclusively in Trinity Bight, many business owners/operators expressed their desire to extend the tourism season. As such, labour shortages are a common problem.

### **7.5.2 Social Capital**

Many scholars suggest that rural tourism is attractive to lifestyle migrant entrepreneurs (Getz and Carlsen, 2000; Marques and Cunha, 2013; Peters et al., 2009), as well as those that wish to engage in volunteer activities (Thulemark, 2011; Vuin et al., 2016). In Atikokan, Ontario, Mitchell and O’Neill (2016b) found that community-based, neo-endogenous strategies, were “enabled by local, and external, stakeholders”, but “implemented by local volunteer groups” (p. 1028). Although extra-local factors fostered neo-endogenous goals, volunteering was limited to local participation (Mitchell and O’Neill, 2016b).

Sardinha (2013) found that when a host community is welcoming to in-migrants, these newcomers “become more community minded”, and partake “in such community activities as fund raising for local charities, supporting local firefighters, helping the local folklore dance groups, volunteering at community festivals, among others” (p. 183). Quite often, lifestyle migrants are determined to become part of the local community and assimilate into rural life. Becoming involved in local activities, and thus, networking, is viewed as a way to gain acceptance from long-term residents, and as an entry into the business community. While local business networks are important, Bosworth and Willett (2011) found that:



...the innate desire for in-migrants to become accepted in their new localities was still a factor in community-focused activities. For some there may be a direct business advantage too, such as the local brewery who sponsored a village cricket team, but for many the decision is not specifically about economic imperatives (p. 204).

In a tightknit rural area, supporting the local community is a responsibility that comes with owning a local business (Bosworth and Willett, 2011).

Counterurbanites, in Brigus and Trinity Bight, participated in community volunteering activities. The percentage of volunteers in Brigus (66.6%) was higher than what was found in Trinity Bight (58.9%). Yet, Trinity Bight's total number of counterurbanite volunteers (10) was higher than that of Brigus (4). Furthermore, eight out of ten rural in-migrant volunteers in Trinity Bight were newcomers. In contrast, three of four in-migrant volunteers in Brigus were returnees. Interestingly, three in-migrants had experience as members of Trinity Town Council.

This research indicates that newcomers put greater effort into gaining local acceptance than returnees. This is demonstrated by at least four in-migrants who opened their firms to communal activities. Philip's café, for example, is a meeting ground for local and seasonal residents, and newly arriving entrepreneurs. These spaces foster trust among locals and newcomers, which is important to in-migrant business success. One well-established proprietor explained how locals are reluctant to engage with newcomers, and "don't like new things coming in, they feel threatened" (Cindy, personal communication, 2012). After six years in business, however, they proclaimed: "we are starting to see local-locals"<sup>70</sup>, there was a woman here with her two grandchildren, that is starting to happen" (personal communication, 2012). Cindy's enthusiasm for mentoring new entrepreneurs, and her commitment to promoting local employment, artists and performers, and non-tourism businesses (e.g. local food distributors), surely contributes to her improving reception from local residents.

Much the same, Bosworth and Willett (2011) found that in-migrant's "engagement with the business network was principally motivated by a desire to be accepted in a small community but also recognized the importance of developing local knowledge and contacts" (p. 203). In rural Newfoundland, in-migrants earned local acceptance through volunteering (e.g. Trinity

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<sup>70</sup> The term "local-locals" is used by some business owners to identify local residents who have never lived outside of the region (Researcher's notes).

Festival) and passing on knowledge and skills that benefited local populations. The following section examines contributions of extra-local cultural capital to neo-endogenous development.

### **7.5.3 Cultural Capital**

Rural in-migrant cultural capital is vital to the revitalization of stagnating rural regions (Herslund and Tanvig, 2012). Externally-accumulated cultural capital can enhance the livelihoods of local residents (e.g. transfer of skills, knowledge), and strengthen the place-based identity of a host community (Steel and Mitchell, 2017). In rural Newfoundland, in-migrants used their extra-locally acquired assets (e.g. education, urban living experience), combined with natural (e.g. ocean, whales) and local (e.g. historic buildings) capital, to create economic and social opportunities in the community (e.g. historical walking tour, non-profit community theatre).

Shown in Section 7.4, the majority of counterurbanites in both communities were post-secondary educated. In Trinity Bight, there was a higher concentration of educated participants than Brigus. Bosworth (2009) found that human capital, such as “the use of the internet, report writing skills, business planning, financial awareness, technical knowledge and accounting skills”, contributed to in-migrant firm success (p. 671). Bosworth (2009) also found that in-migrant cultural capital benefited local business owners. For example, one participant from his study “felt that he was educating other local service providers such as his bank and his accountant who were unaccustomed to dealing with exporting businesses” (Bosworth, 2009, p. 671).

Cultural capital is acquired through education, urban living, and life experiences. In Brigus, at least five out of six counterurbanites held a college diploma or higher. In contrast, at least 14 of 17 Trinity Bight counterurbanites attained a college diploma or higher. At least one counterurbanite from Brigus was graduate school educated, compared to at least five found in Trinity Bight. Given this, a higher concentration of educated counterurbanites resided in Trinity Bight. What is more, Trinity Bight newcomers (3 PhD; 5 Bachelors) were, on average, more educated than returnees (2 Masters; 1 Bachelors); the opposite was true of Brigus newcomers (1 College) and returnees (1 Masters; 2 Bachelors; 1 College).

International living experience was a unique finding of newcomers to Trinity Bight. For example, six newcomers possessed cultural capital from international living experience, as well

as cultural differences inherited from their birth countries. Conversely, there were no participants in Brigus with international origins. Also, Trinity Bight returnees and seasonal in-migrants enjoyed greater corporeal mobility (e.g. travel, urban exposure), which influenced their ability to access cultural capital. For example, four out of five returnees to Brigus were permanent counterurbanites. In comparison, none of Trinity Bight's returnees became full-time residents. As such, many in-migrant entrepreneurs in Trinity Bight were exposed to urban cultural capital for at least half of each year (i.e. lived seasonally in Trinity Bight). In addition, seasonal in-migrant business ownership was more prevalent in Trinity Bight (12/17) than Brigus (2/6).

Seasonal counterurbanites may provide greater local benefits because of their cyclical exposure to new forms of cultural capital (Gallent, 2015), known to cultivate in urban centres (Florida, 2002). As recalled from Chapter 2, "second home owners, in particular, are *instrumental* in building social capital within rural communities through a tendency to act as incidental bridges to extra-local resources" (Gallent, 2015, p. 101). In other words, with each return to their seasonal community, in-migrants deliver new forms of capital. It appears that seasonal mobility also contributes to business know-how. Some respondents gained knowledge and experience needed to start their business while travelling. In Trinity Bight, for example, at least four in-migrants claimed that experiences at non-local tourist accommodations, gave them ideas for their own business. Only one counterurbanite in Brigus provided the same answer.

In both communities, extra-locally accumulate cultural capital also resulted in the transfer of knowledge and skills, and socio-economic development initiatives. For example, theatre performers were found to pursue professional dance and acting careers. Also, local students inherited knowledge through in-migrant involvement in civic sector activities (e.g. mentoring). However, Trinity Bight migrants appeared to provide greater local benefits. This was most visible of employees who learned new skillsets (e.g. jewelry apprentice) and achieved career advancements (e.g. management positions). For example, one newcomer indicated that many of her employees gained professional fine dining experience at her upscale restaurant (Tracy, personal communication, 2012). Another newcomer paired his employees alongside experts, such as established culinary chefs; "our emphasis is on skill transfer. Empowerment of local people would be an elaborate way to put it", he proclaimed (Gary, personal communication, 2012).

Empowering local people builds capacity by enabling “local people to move from their status of objects manipulated by external forces and victims of social processes, to the status of subjects and active agents of change” (Tilakaratna, 1987, cf. Alana Albee Consultants, 1995). Some in-migrants were recognized for their commitments to social and economic change through provincial awards. In Trinity Bight, at least four newcomer entrepreneurs received awards for their involvement in social-economic development. For example, Gary and his family were praised for their promotion of Newfoundland art and culture. In 2013, they were awarded the Patron of the Arts Award from the Newfoundland Arts Council (Memorial University, Faculty of Business Administration, 2014). A local newspaper clipping reads,

“We view business as primarily a social enterprise,” he [Gary] said, in reaction to the award. Economics is important to enable access to markets and give generous compensation to staff, he said, but the business also aims to provide the very best experience to its guests and invest in the community (The Beacon, 2017a).

Bonnie, another accomplished newcomer, was awarded an honorary doctorate for “her contribution to the development of Newfoundland’s theatre [Rising Tide Theatre], tourism and rural economy” (Gazette, 2003). These acknowledgements demonstrate the commitment of some in-migrants to their host community.

In-migrant cultural capital also contributed to neo-endogenous development through community promotion (e.g. tourism-related website) and business cooperation (e.g. distributing business pamphlets). In Brigus, travel-related cultural experiences helped a returnee to establish his walking tour business, which aimed to raise youth awareness of local history. In Trinity Bight, a newcomer proprietor found that rural communities often lack human and financial capital to market their tourism industry. Because of this, she took on the task of creating a tourism-focused website for the region. Whatever their motives may be, many scholars suggest that rural business success is determined by social embeddedness and “interpersonal relationships (ties) that can enhance an entrepreneur’s ability to succeed” (Korsgaard et al., 2015b, p. 576; see also Bürcher, 2017; Jack and Anderson, 2002; Kloosterman, 2010). Thus far, the social impacts of in-migrants, such as volunteering and community promotion, have been explored. Next, financial indicators of in-migrant-induced neo-endogenous development are examined.

#### 7.5.4 Financial Capital

Illustrated above, in-migrant entrepreneurs are typically educated and culturally enlightened. According to the literature, they are also associated with higher levels of disposable income compared to non-migrants (Hedfeldt and Lundmark, 2015). As such, Bosworth (2009) suggests that “Without the financial pressures of having to earn a living, those in early retirement or semi-retirement are able to tackle new projects or expand their hobbies into business activities” (p. 668). In this research, in-migrant financial capital has been advantageous to local communities in at least three ways: employment/higher-wages, enabling local wealth generation, and community investments (i.e. heritage restoration, sourcing local food). Yet, once again, in-migrant financial capital led to greater benefits in Trinity Bight than Brigus.

In Trinity Bight, discretionary income enabled at least three business owners (two newcomers, one returnee) to hire surplus staff to ensure their E.I eligibility. For example, one newcomer stated “I have employed a lot of people over the years...and that is important even when I couldn’t really afford it, they had to make their E.I for the winter” (Nancy, personal communication, 2012). Also, at least six Trinity Bight newcomers paid their employees above minimum wage. Some business owners offered financial incentives to promote staff to take on greater responsibilities. For instance, one newcomer encouraged workplace autonomy through leadership rolls and management positions. According to a Canadian magazine article, at this Port Rexton business, “staff are given license to make suggestions about improving the business as well as empowered to make decisions, which mean they get made more quickly” (Smith, 2016). The magazine quotes the owners: “Our view is that a happy, enfranchised, involved, engaged staff is the secret to keeping guests happy” (Smith, 2016, quoting Gary).

Bosworth and Willett (2011) suggest that one of the main reasons some in-migrant entrepreneurs hire locally is “to be accepted by the local community” (p. 203). Others (Hedfeldt and Lundmark, 2015; Kalantaridis and Bika, 2006; Skokic and Morrison, 2011) recognize that it is difficult to find qualified employees in sparsely populated areas. If skilled labour is available, small tourism firm operators often “recognize that they cannot pay high wages [but] they can offer flexibility to suit certain sections of the community” (e.g. low-skilled workers) (Bosworth and Farrell, 2011, p. 1487). In Trinity Bight, newcomers with disposable income were able to pay higher wages to encourage long-term employment of local residents. This helped to retain

workers for the following seasons and improve the standard of living of local residents through viable incomes.

Counterurbanite business owners/operators are also significant facilitators of wealth generation. In Trinity Bight, for example, at least three newcomer entrepreneurs provided storefront space for locals to sell their artwork and/or handcrafts. The same finding was true of only one return migrant business owner in Brigus. In rural parts of the United States, Glasgow et al (2013) found that “older in-migrants were heavily involved in the creation of an arts cooperative. The purpose in starting the arts co-op was to give local artists and crafts makers a venue for displaying and selling their work” (p. 246). These so called “social entrepreneurs” began as volunteers, raising money for the local library and a community theatre, and were more educated and better-off financially than long-time residents (Glasgow et al., 2013, p. 245).

Finally, in-migrant proprietor financial capital contributed to significant cultural heritage restoration and preservation. For example, some newcomer B&B operators, in both Brigus and Trinity Bight, occupied registered heritage sites (e.g. Bartlett/Burke House and Gover House), which helped to preserve their condition. Similarly, Moscardo (2014) found that non-local tourism entrepreneurs brought financial capital, or, collaborated with local groups on community-based grants, that contributed to “the revival of traditional cultural activities and the restoration of built heritage” (p. 363). What is more, the owner of Gover House matched her own money with government funding to restore one of Trinity Bight’s most historic homes. As a result, Campbell House was converted into a living museum B&B and is now a formally recognized Provincial Heritage Site. Returnees, too, invested in built heritage and cultural activities, such as the local wharf in Trinity Bight, and the start-up costs for the *Baccalieu Players* in Brigus. Likewise, in Northumberland, England, Giles et al (2013) identified in-migrants whose businesses occupied abandoned historic buildings, which added economic value to the local community. In-migrants in Northumberland also sought to re-inforce place-identity through local food. For example, business owners sourced local meat so that they could tell tourists they bought it from the local butcher (Giles et al., 2013). Newcomers, in Trinity Bight, took to sourcing local produce, for example, as a way to promote their authentic image and ensure non-tourism businesses also profited from local tourism.

In brief, newcomers appear to achieve greater neo-endogenous development goals compared to returnees. This observation is determined by the higher concentration of newcomers

at the study site where tourism clustering occurred (i.e. Trinity Bight). In Trinity Bight, newcomers employed a higher number of local residents, participated more in volunteer activities, demonstrated greater effort to become accepted by, and part of, the community (e.g. opening businesses as communal areas), contributed greater financial capital to revitalization projects, and paid higher wages to their employees. It is recognized that this is not always the case. Rather, these observations are averages, and thus deserving of further examination.

## **7.6 Summary and Demi-regularities**

While a number of conclusions can be drawn from this analysis, the researcher must limit the structures and conditions to be examined, which can “then be tested with a modified or new research design” [i.e. ontological stratification] (Ignatow and Mihalcea, 2016, p. 26). This does not explicitly exclude possible influences from alternative structures and conditions; rather, it narrows the confines of the research to a practical number of observations to be investigated further. Alternative structures and mechanisms may be re-examined later on through retrodution if they are deemed significant to the explanatory process.

Three main themes are chosen, one each from the three main bodies of literature, and are examined as event demi-regularities. First, the civic sector plays a key role in the initial stage of the tourism path trajectory. Second, there is a relative absence of local resident participation in tourism entrepreneurship compared to counterurbanites. Third, though this study originally intended to focus on Trinity, it became too difficult to study the town in isolation from the greater region of Trinity Bight. For this reason, a key focus in the next chapter is to uncover the reasons for tourism clustering in only one of the two study sites, and, whether or not a higher concentration of newcomers contributed to this phenomenon.

## 8 Retroduction

### 8.1 Introduction

The second half of this discussion applies retroduction to determine possible mechanisms responsible for the observed phenomenon. To recap, retroduction is a “mode of inference in which events are explained by postulating (and identifying) mechanisms which are capable of producing them” (Sayer, 1992, p. 107). To execute this, abduction extracts observable demi-regularities from identified structures and conditions, which are redescribed using existing concepts, ideas, and theories. From this, retroduction involves “moving backwards” from what is known of a phenomenon (demi-regularity), to identify the causal powers, and the generative mechanism that produces the event. In other words, retroduction questions “what must be true in order to make this event possible” (Easton, 2010, p. 123), by way of counterfactual thinking (Meyer and Lunnay, 2013). This involves moving back and forth between the transitive (“theories, concepts and discourse or research”) and intransitive (“enduring structures and properties of objects that enable and constrain human agency”) domains (Botterill, 2007, p. 122), in search of the best (but fallible) explanation of observed phenomenon.

The purpose of this chapter, therefore, is threefold. First, event demi-regularities, derived from the structures and conditions observed in Brigus and Trinity Bight, are explored further through retroduction of additional primary material, to identify their causal powers<sup>71</sup>. Second, retroduction compares and contrasts causal powers to extant literature and secondary material, which give rise to the generative mechanisms responsible for producing the events. Third, conclusions are drawn from each of the events identified, and left open for further interpretation in the final chapter.

### 8.2 Path-Creation or Stuck in the Past?

One dominant theme, or demi-regularity, emerged from the findings that pertain to path dependence. This theme draws attention to the civic sector as initial drivers of new path-creation. To understand why, and how, this event occurred, interviews were conducted with key

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<sup>71</sup> Causal powers are italicized throughout Chapter 8 to draw attention to casual patterns.



informants, such as members of civic groups, municipal employees, and government stakeholders. These results are presented below, and incorporated into extant literature using retroductive reasoning.

### **8.2.1 Demi-Regularity 1: Civic Sector as Initial Driver of New Path-Creation**

The evolution of Newfoundland's industrial development was described by Michael Clair, a representative from the Harris Centre, at Memorial University. Clair explained that the provincial government really became involved in tourism as early as the 1920s. At that time, tourism was largely based on outdoor adventure travel (e.g. hunting, fishing, hiking). Travel increased post-Confederation, which created a demand for new and improved infrastructure, such as accommodations and visitor amenities (personal communication, 2012). However, it was not until the 1970s, that "people started seeing the writing on the wall, that the fishery was coming down, that they got to thinking, oh we need to diversify the economy" (Clair, personal communication, 2012).

Following the decline of natural resource industries in the 1970s, which coincided with neoliberal cutbacks to state welfare programs, including social planning, many non-profits began to surface "to take care of those marginalized individuals who now found themselves without state support" (Lionais, 2015, p. 27). During the 1970s and 1980s, "community corporations", such as the Great Northern Peninsula Development Corporation (GNPDC), "were established to create economic activity for the purpose of community development" (Lionais, 2015, p. 27). The approach looked to co-ops, non-profits, and community businesses, as "the main social enterprise forms" (Lionais, 2015, p. 27). In the late-1990s, the provincial government introduced the Strategic Social Plan (SSP), which "signified a "community turn" in economic development and prioritized the bottom-up involvement of community actors, empowering them to be a part of the policy process" (Krawchenko, 2016, p. 10). The SSP was implemented through the REDBs' "volunteer-elected board of directors" (Belbin, 2010, p. 45).

A core element of the SSP was to integrate social challenges into economic planning, and to place more emphasis on the role of public consultation, and public involvement, in the planning process (Rowe and Randell, 1999). A "major breakthrough" of the SSP was the "integration of the volunteer sector into this process" (Locke and Rowe, 2010, p. 4). The role of REDBs was to empower "community volunteers [to] play a lead role in shaping development in

their regions” (Locke and Rowe, 2010, p. 4). This approach was well-received, since there “is a long history of *volunteerism*, or “*contributing*” and “*giving back*” to community, in Newfoundland and Labrador (NL), across many sub-sectors of the voluntary, non-profit sector” (Locke and Rowe, 2010, p. 2, emphasis added). This notion was echoed by Mr. Hutchings, the Minister of Innovation, Business and Rural Development, who claimed,

...in terms of community capacity, we’ve, on a national average, I think we have the *greatest ratio of volunteers of anywhere in the country*, whether that is local governments, whether that is non-profit groups. So we believe we have tremendous capacity on the ground (personal communication, 2012, emphasis added).

Ella Heneghan, a Tourism Development Officer, at the Department of Tourism, Culture and Recreation<sup>72</sup>, shared that volunteering among elders, especially, in community-based activities, such as church, has long been a social activity in Newfoundland. This is particularly true of cultural heritage events and in the development of tourism amenities, which are almost entirely dependent on volunteers (Heneghan, personal communication, 2012).

At the time of the cod moratorium, cultural heritage tourism development was an immediate response of many local groups. In light of economic uncertainty, rural communities had little choice but to reinvent themselves (Heneghan, personal communication, 2012). Given this, Clair suggests, “if you have *passionate people* in a community, that *want to sustain it*, then they will come up with ideas to make it survive” (personal communication, 2012, emphasis added). There is evidence of this in Ferryland, along the Avalon Peninsula. Sullivan and Mitchell (2012) identified civic-led activities, such as the Ferryland Museum (1974), Southern Shore Shamrock Festival (1986), Colony of Avalon (1994), and Summer Theatre (1999), as the building blocks of the region’s tourism trajectory. Much like the rest of the province, Carter et al (2001) proclaim, “Historic Sites, both natural and cultural, are a key cultural resource for the development of heritage tourism” (p. 113), and are a by-product of local and provincial non-profit associations (Historic Sites Association of Newfoundland and Labrador, n.d.). It is now apparent, that this statement is also true of Brigus and Trinity Bight.

Further examination reveals how this has unfolded. In both communities, civic and volunteer enthusiasts were driven by a *sense of unity*, the desire to *preserve local history*, and an attachment to *community identity*. Yet, interviews suggest that this enthusiasm began long before

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<sup>72</sup> Now known as the Department of Tourism, Culture, Industry and Innovation.

the economic decline of the 1990s. In Brigus, for example, the Mayor is a life-long volunteer at various community organizations (personal communication, 2012). He describes his involvement below,

I always had a great interest in the community and if there was something going on, I wanted to help. Back when I was a teenager, I raised money for the Church. I have been involved with Town Council. I have been involved with the Fire Department for 32 years. I led a soft ball league. You had to work hard at everything (Mayor of Brigus, personal communication, 2012).

Born and raised in Brigus, the Town Clerk is another example of the strong sense of community in Brigus. After spending several years off the island, securing a post-secondary education, he was thrilled at the opportunity to return home. His attachment to the community is undeniable...

For 27 years I have worked my way up and consider myself fortunate that I can work where I live...the room I sleep in now is the room I was born in...family home was bought in 1955...and when my mom passed away, the house was left to me because it was tradition that the youngest son get the house, so in 1991, I fixed it up. I have two children and they are grown up. I am still here (Brigus Town Clerk, personal communication, 2012).

During the interview, his wife called to inform him that dinner was about to be served. He relayed the message that he must get home, explaining “now that is a Newfoundland thing, we all sit down together for dinner” (Brigus Town Clerk, personal communication, 2012). This conversation affirms the importance of unity within the community, and the bonds that some share, to the place they call home.

To some, *preserving the town’s history* was of utmost importance. A conversation with the President of the BHCS helped to determine why. After his father’s death, he returned to Brigus to his ancestor’s land, which was purchased in 1769. Promoting the community’s historic legacy is important to him,

I enjoy giving back to the people and the community and the province of Newfoundland ...and the town of Brigus, if I didn’t enjoy it I wouldn’t be at it, I can guarantee that... my thoughts and ambitions are to promote the historic value of this town and of the province...the Historical Society, I got involved with that to see how I could help. And this past year, they have made me president, because I want to try and recoup, rebuild the Historical Society. It kind of got too, well, I don’t know, a lot of people around thought that it [Stone Barn] was a family museum. You know a lot of people didn’t think it was a community thing, so I wanted to try and rebuild it so that you know it felt like it belonged to the community. And if the people want to participate then it is there and they can be a part of it (BHCS President, personal communication, 2012).

In Trinity, too, the Historical Society is an important source of *community identity*. The Mayor of Trinity, for example, has been involved with the Historical Society for much of his life. He was born and raised in the area, leaving only briefly to attend Memorial University. Starting in 1995, he returned home to work as a summer student at the THS's Green Family Forge Museum, followed by a few summers as a tour guide with the THS (personal communication, 2012). After his second year away, he returned to Trinity, and,

...was given a supervisor position, one step up, I was allowed to supervise some students and take care of one of the buildings. Then, after my third year of school, I had taken a few history courses, and that summer, got in charge of organizing the archives for the Historical Society that go back to the 1750s. I spent a few summers doing that, organizing and learning, and then got bit by the history bug. After graduating from Memorial, I was offered the project co-ordinator position, which is practically the manager position at the Historical Society. I have been here ever since, so this is 16 summer seasons (Mayor of Trinity, personal communication, 2012).

In 2006, he became involved with Town Council, landing a position as Mayor. He was motivated by the lack of a "heritage mindset" of council, and because he saw "a void in the town" (Mayor of Trinity, personal communication, 2012). He also sits on other development committees and writes "most of the grants" for the committees to which he belongs to. To put this into context, he has received almost \$2 million in government funded grants for the town from 2007-2012 (Mayor of Trinity, personal communication, 2012).

Philip, the President of the THS, also has *strong ties to the community*. His family has owned property in Trinity since 1710; "this is home to me. I used to come back for the summers, as soon as school was over, every summer" (personal communication, 2012). His grandfather was the THS's second president, and he helped re-construct the town's first theatre. His father was also involved with the THS, an organization that Philip has proudly belonged to for over 30 years. Generational involvement of families in community-based activities is common in Newfoundland. As outport populations decline, local residents inherit more responsibility, Philip explains,

You see what you will find here, especially in rural communities in Newfoundland, is a small number of people that will be involved in everything. Like, I am the President of the Historical Society, and I own a business. I am on Town Council, but Jim, he is the Mayor. He does a lot of work with the church, and also works with the Historical Society. There are like six to ten people who do a lot (Philip, personal communication, 2012).

The level of *commitment to the community* is undeniable. As to why, the Mayor's response was: "I am not sure why we are all doing it, I guess for the greater good of the cause" (personal communication, 2012).

According to Heneghan, at the Department of Tourism, Culture and Recreation, much of the civic and community-based development was made possible through moratorium-related government funding. In the past 20 years, many rural communities took advantage of joint federal-provincial grant money, made available for economic diversification (Heneghan, personal communication, 2012). With reference to Ferryland, provincial-federal monies, donated to civic groups (e.g. Colony of Avalon Inc.), helped to establish the region's cultural heritage tourism trajectory (e.g. Sullivan and Mitchell, 2012). Eleanor Dawson, also with the Department of Tourism, Culture and Recreation, provided another example of civic-led development in the town of Elliston, which is located approximately 50km north of Trinity Bight.

Early 1990s, cod moratorium, small town of 500, people were leaving in droves. The population in their town dropped by about half after the moratorium, it got so bad that the tax base had, the council had to make the decision to turn out the street lights. So the lights literally went out. So when people saw the lights in the town go off, this was so real to them, that the economic downturn was so bad. They formed a tourism committee, and said they had to do something to save their town. So they started meeting once a week and sought money, brainstormed for things in the community and said we have all these roots cellars, and they have a colony of puffins and they have a very high number of heritage buildings, so they got together, put enough money together and hired a tourism planner. They took on the root cellars as their theme (Dawson, personal communication, 2012).

A plethora of other community-based groups are visible across the province (e.g. Carter and Fusco, 2017; Fife, 2004a; Fife, 2004b; Kearney et al., 2007). It appears that at the root of civic involvement, is the desire to *promote local history* and preserve community identity. This is no surprise, given the record of volunteer engagement in Newfoundland, which comes, no doubt, from "their *sense of identity*, their *culture*, [and] their *pride* in themselves as a *distinct and hardworking people*" (NRTEE, 1995, p. 3, emphasis added). Not only this, but "outports were intimate communities of *close-knit* extended families", who would "use whatever means available to hold fast to their cherished land" (Gmelch and Royal, 2016, p. 34, emphasis added).

A discussion with the Co-founder of Rising Tide Theatre helped place the role of civic participation in the context of rural Newfoundland's tourism trajectory. In Bonnie's words,

What happened, I think, is that one of the things that found its footing was tourism, and what they call cultural tourism. And, so that kind of found its footing between the cultural tourism, the built heritage which is obviously very important in places such as Bonavista. But...I mean, these were things that people had a *genuine innate interest* in that also began to loop in very well with an economic possibility. Because, ultimately, it could have an economic impact and could provide employment and economic spin-offs to businesses and all those kinds of things. So really, it was both a genuine interest and a part of a number of people who got involved in the early days, plus, the possibility for an economic alternative (personal communication, 2012, emphasis added).

This was the case of Rising Tide Theatre, Bonnie explained. She has a genuine interest in promoting Newfoundland art and theatre. Likewise, Holly started the *Baccalieu Players* was an opportunity to *share the history* she had learned through conversations with people in the town. She, along with a few local residents, “had no ambition in tourism, but we just wanted to represent Brigus theatre” (Holly, personal communication, 2012). Despite not being compensated, and long hours of work, Holly suggested, “you would be surprised at the commitment” (personal communication, 2012).

Information provided by Minister Hutchings helped to determine the link between rural communities and the rise in cultural tourism products. He pointed out,

The culture of rural Newfoundland and Labrador, we are *strongly tied to culture*, music, song, heritage, and I think we have seen a renaissance and/or re-awakening in the past 10 or 15 years, which goes to the whole issue of tourism and cultural identity and selling ourselves, not only here but around the world. I guess that is with our investment, but there is also a *newfound pride* that Newfoundlanders and Labradoreans have, that we are taking a rightful part of (Hutchings, personal communication, 2012, emphasis added).

This rebirth of cultural identity he refers to is explored in the literature. Prior to union with Canada, there was a sense of urgency to preserve cultural identity, and retain a degree of independence in Newfoundland. Since Confederation, their identity has been somewhat tarnished because of their reputation as underdevelopment and culturally “backwards” (Channing, 1982, p. 42). In fact, some argue that “Canada’s perception” of the island “revealed short-sightedness and a lack of knowledge and understanding of Newfoundland’s problems” (Channing, 1982, p. 42).

Newfoundland’s *unique identity* was further compromised when it merged with the Maritime Provinces to become what is known as the “Atlantic Canada” region. Despite geographic similarities with easterly provinces, Newfoundland is culturally, linguistically, and socially (e.g. class historically dictated by merchants) dissimilar to the rest of the Maritimes, let

alone Canada (Conrad, 2002). Although cultural traditions and social norms have eroded, and economic circumstances have vastly improved over time, Newfoundland's past is plagued with unflattering nuances from that of Canada (Chafe, 2003; Conrad, 2002). For example, islanders have been portrayed as people who "drank too much, were poor housekeepers", who were "irresponsible, uneducated" (Conrad, 2002, p. 163) and "backwards with no vision" (Delisle, 2015, p. 83). Such stereotyping, according to Conrad (2002), "would be unacceptable if all people in the region had a different skin colour, or shared a common physical handicap" (p. 163).

Quite the opposite, are some who suggest that Newfoundland's culture is "*a strategy of survival*", which emerges "only when a society is "poised on the brink of...the *loss of identity*" (Bhabha, 1990, p. 304, cf. Chafe, 2003, p. 70, emphasis added). Chafe (2003), a native Newfoundlander, proposed that "it is only when people are massed together for the means of identification and absorption into a greater community that "culture" becomes an issue. The "culture" offers a much desired difference and identity to a people on the edge of consumption" (p. 70). This is not to say Chafe agrees with this statement, nor does it imply it to be true in this case. Rather, there is a possibility that Newfoundland's culture has, in part, been created "to combat the feelings of alienation and financial desperation that plagued Newfoundland before and after Confederation" (Chafe, 2003, p. 70, see also Overton, 1988).

Nonetheless, a seminal piece by David Alexander (1980), entitled: *New Notions of Happiness: Nationalism, Regionalism, and Atlantic Canada*, argues that identity could be "felt and expressed more strongly in Newfoundland than in any other province of English-speaking Canada" (p. 82). This idea is corroborated by Delisle (2015), who adds that, historically, the impetus to modernize, created the illusion that Newfoundland's own government was "ashamed of its own heritage as it attempt[ed] to assimilate into the Canadian nation", and a deep seeded fear of the "extinction of Newfoundland culture" (p. 83).

This narrative substantiates the fears that exist today, which encompasses the *loss of community identity*, and has resulted in the assumption that tourism may be the only hope. Bonnie, from the Rising Tide Theatre, elaborates,

...you also want to have what everyone else has so there is kind of not an acceptance that no, not every place should have everything...that is something that is a long way from being understood and part of that is that people want these things kind of as an *emotional community attachment* reasons and part of it is that they want it for economic reasons but I don't know, I will go back to it, I just don't think that there is a real plan, and people are really nervous in Newfoundland to talk about those kind

of plans because of resettlement, because resettlement always rears its ugly head and for good reason. Whenever you start talking about who will survive and who will not and *resettlement is such a wound and scar on Newfoundland* that people really back back away from any kind of conversations around communities and who will be funded and what will survive and what will not, resettlement made it really difficult to have that conversation (personal communication, 2012, emphasis added).

These fears are not surprising. Critics of the province's resettlement programs declare that "the largest price paid has been the *loss of the traditional lifestyle*" (Mayda, 2004, p. 28, emphasis added). Even though resettlement in the 1970s was largely unsuccessful at alleviating social and economic despair, fishing remained a part of life in newly settled communities. The climate post-cod moratorium (1992), however, has been drastically different. Many of those who have relocated are elders, who only know one way of life: "Many residents dread the destruction of a way of life as the culture and tradition that is distinctly Newfoundland is once again assaulted" (Mayda, 2004, p. 31). This difficult chapter of Newfoundland's past is the subject of other literary works. For example, Crummey's (2015) novel recounts the impacts that resettlement, and work-related mobility (e.g. leaving to work in Alberta oilfields) had on the social fabric of outport life. Taking this into account, Delisle (2013) questions,

... [if] Newfoundlanders are defined by an identity grounded in place, rather than racial or religious commonalities. How, then, can a Newfoundland identify continue to exist once its subjects are removed from that place of origin? In other words, if not for place of residence, how is Newfoundlandness defined and demarcated? (p. 145, emphasis added).

Therein lies tourism; an opportunity to reinforce, and, renegotiate, what it means to be a Newfoundlander. Indeed, many studies of small-scale rural tourism in Newfoundland (e.g. Ramos et al., 2016; Rockett and Ramsey, 2017; Springuel, 2011; Stoddart and Graham, 2013; Sullivan and Mitchell, 2012), indicate positive correlations between cultural heritage tourism and Newfoundland's distinct identity. For example, Doody's (1999) interaction with locals finds that some rural areas are enthusiastic about tourism because it promotes "heritage, and "tradition," and "*cultural survival*" (p. 31, emphasis added). Ramos et al (2016) suggest, a "prevalent theme is that interactions with tourists *enhance participants' sense of pride in the community and place*" (p. 216).

Yet, critics of Newfoundland's cultural tourism (e.g. Pocius, 2000) suggest that the industry is "preserving a past that often smacks of cultural voyeurism for the sake of tourists" (p. 273-74). Others, too, are skeptical of commoditizing Newfoundland's culture, as it is nothing



more than “a way in which culture is represented under capitalism” (Overton, 1980, p. 115), that reinforces negative stereotypes of its people as naïve fish-folk (Bill, 2009). On a more positive note, Rockett and Ramsey’s (2017) research concludes that tourism strengthens community identity, and instills a sense of pride among locals, but, should remain small-scale, to preserve its cultural significance and historical accuracy.

To summarize, Newfoundland has a long history of social engagement and local cooperation (e.g. volunteering). Historically, outport culture is that of unity and community cohesiveness. It has also been painted as ‘backwards’, and an economic burden on the rest of Canada. With all that considered, the cultural renaissance, of the 1960s and 1970s, and the rise of cultural tourism, provided an opportunity to restore people’s confidence in their past; one of hardship and perseverance, not indicative of collective defeat. Perhaps, then, under the conditions of a) little choice but to find economic alternatives to the fishery, and b) massive amounts of government funding for tourism, local residents’ ‘causal powers’ (e.g. motivations generated out of fear of losing their cultural identity, of forced resettlement, and of the erosion of traditional outport life, which encouraged community-mindedness and volunteer-drive), were activated, which, in turn, generated a ‘collective diasporic identity’ mechanism. This terminology is borrowed from Chiang (2010), who uses the phrase to explain a collective population that has been displaced that establishes distinct social structures in a new location. Moreover, Chiang (2010) suggests:

Through the attachment to homeland, cultural traditions, and shared history of displacement, diasporas establish a collective symbolic community and identity, contributing to cultural solidarities. A collective diasporic identity is necessary because it provides the community with a new possibility to appreciate and critique the past—their history and their positioning. In a social structure that is often based on systems of exploitation, diaspora consciousness is actually constituted by suffering that accompanies strategies of survival (p. 38).

It is determined, therefore, that a ‘collective diasporic identity’ is the generative mechanism responsible for driving civic and volunteer-led tourism path-creation. This mechanism was generated under the conditions of limited alternative economic opportunities and significant government investment in tourism development, which activated civic groups’ passion for community participation, sense of cultural pride, anxieties induced by the possibility of another resettlement phase, among other causal powers mentioned above. In other words, a collective diasporic identity manifests from a united effort of local people to save their communities, which

is driven by their collective past: (e.g. history of Newfoundland resettlement (whether impacted personally or not), experiences (e.g. amalgamation), and culture (e.g. threat of losing outport way of life). The concept of collective diasporic identity is returned to in the next, and final, chapter.

Interestingly, respondents perceived tourism to benefit local businesses. Why, then, are so few locals operating private-led tourism businesses? In other words, why is there an overwhelming majority of counterurbanite entrepreneurs in these two rural locales? The next task is to uncover the mechanism responsible for this empirical finding.

### **8.3 Whose Path?**

This research explored rural in-migrant entrepreneurship in tourism communities in Newfoundland. Findings show that the vast majority of tourism-related businesses are owned and/or operated by newcomers and returnees. What is interesting is the absence of local tourism businesses owned by long-time residents of Brigus and Trinity Bight. Drawing on critical realism, Mingers (2014) suggests “absences and omissions may be causes and thus may legitimately be part of mechanistic explanations” (p. 63). What is more, it is difficult to recognize absences as they are often not localized to a problem. In other words, absences do not exist in the physical realm, but are nonetheless significant, because they “often lie at the heart of causal [powers]” (Mingers, 2014, p. 63). As such, causation, for the *absence* of locally-operated tourism businesses, is the mechanism under investigation.

#### **8.3.1 Demi-Regularity 2: Lack of Local Resident Participation in Tourism Entrepreneurship**

The first task is to examine residents’ perceptions of tourism in their community. While older studies of Newfoundland and Labrador find cultural tourism problematic (e.g. Overton, 1980), more recent studies indicate attitudes towards tourism are largely positive (Ramos et al., 2016; Springuel, 2011). To illustrate this, Ramos et al (2016) found that “a very large portion” of residents (94.0%) agreed, or strongly agreed, that tourism provided them with social and economic benefits (p. 217). Some benefits include: the ability to share their culture with visitors, and economic aspects that enable them to remain in their community. And, from this, they conclude,

On this front, there is strong evidence that tourism offers many intangible outcomes and that the fear of a mummification of culture observed by Reid and George

(2005)<sup>73</sup>, Overton (1996) and others, is not dominant within the interpretive frameworks of members of the site's host communities (Ramos et al., 2016, p. 217).

This research supports Ramos et al.'s (2016) claim, in that tourism is widely perceived as economically and socially beneficial. Shown in Table 8.1, the majority of local residents agree that tourism provides economic benefits to local businesses (Brigus: 93.0%; Trinity: 100%), and the community in general (Brigus: 71.8%; Trinity: 100%). Many did not, however, agree that tourism provided benefits to them personally (Brigus: 19.7%; Trinity: 50.0%). Residents are largely in favour of newcomers opening tourism-related businesses (Brigus: 67.6%; Trinity: 83.3%). And, very few residents perceived there to be problems associated with tourism (Brigus: 12.7%; Trinity: 25.0%). Problems that were reported include increased traffic and "disneyfication" of products and services (e.g. unauthentic "selling" the rural - Koleva, 2013, p. 146). Yet, these contentions were only expressed by two respondents from Trinity.

The practice of commodifying culture for tourism was generally viewed as positive. In Brigus, the majority (72.3%) of residents either strongly agreed, or agreed, that capitalizing on local culture and history for tourism is a good idea (the remainder were indifferent) (Table 8.2). Still, only half (50.0%) of respondents agreed that tourism products and services accurately reflected local history and culture (Table 8.1). In contrast, all resident participants (100%) in Trinity strongly agreed, or agreed, that using local culture and history for tourism is a good idea (Table 8.2). Also, nearly all (83.3%) respondents reported local tourism products and services to be accurately portrayed (Table 8.1).

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<sup>73</sup> Authors are actually in reverse order in reference page, i.e. George and Reid (2005).

**Table 8.1** Residents' Perception of Tourism

Survey questions and responses	Does tourism provide economic benefits to local businesses?	Does tourism provide economic benefits to the community?	Do you personally benefit from tourism?	Are you in favour of newcomers opening businesses that cater to tourism?	Do you think that the products/services that are provided for local tourists accurately reflect local history and culture?	Are there any problems associated with tourism in the community?
Brigus (n=71)						
<b>Yes</b>	66 (93.0%)	51 (71.8%)	14 (19.7%)	48 (67.6%)	29 (50.0%)	9 (12.7%)
<b>No</b>	0	5	55	4	5	52
<b>Not sure</b>	4	11	2	6	29	9
<b>No reply</b>	1	4	0	11	8	1
Trinity (n=12)						
<b>Yes</b>	12 (100%)	12 (100%)	6 (50.0%)	10 (83.3%)	10 (83.3%)	3 (25.0%)
<b>No</b>	0	0	5	2	2	9
<b>Not sure</b>	0	0	1	0	0	0
<b>No reply</b>	0	0	0	0	0	0

**Table 8.2** Residents' Perception of using Local Culture and History for Tourism

How do you feel about using local culture and history to promote tourism development?	Number of respondents in Brigus (n=71)	Number of respondents in Trinity (n=12)
<b>It is a very good idea</b>	40 (56.3%)	9 (75.0%)
<b>It is a good idea</b>	12	3
<b>It doesn't matter to me one way or the other</b>	10	0
<b>It is a bad idea</b>	0	0
<b>It is a very bad idea</b>	0	0
<b>I do not know</b>	7	0
<b>Did not reply</b>	2	0

Why, then, are local residents not more involved in tourism entrepreneurship? The next step is to determine if their employment status, or, age, play a role in their decision not to open a tourism firm. Illustrated further, in Table 8.3, residents from both Brigus and Trinity provided reasons as to why they were not employed in the local tourism sector. Approximately eighty percent of respondents in Brigus are employed elsewhere or retired. In Trinity, all (100%) participants were employed elsewhere or retired (minus two that are employed in tourism). Interestingly, in Brigus, over ten percent of those that did not fall into the aforementioned categories had no desire to work in tourism.

**Table 8.3** Residents' Reasons for Not Participating in Private Sector Tourism

Reasons for not working in tourism	Number of respondents in Brigus (n=71)	Number of respondents in Trinity (n=12)
<i>Employed in tourism</i>	1	2
<b>I am employed elsewhere</b>	22	4
<b>I have no desire to work in tourism</b>	8	0
<b>I am retired</b>	33	6
<b>There are currently no jobs available</b>	4	0
<b>I would like to start my own tourism-orientated business but can't</b>	0	0
<b>Other</b>	2	0
<b>No reply</b>	1	0

It is important to take into account that both communities have an aging population and a history of youth outmigration. This is reflected in the rate of employment in Brigus and Trinity, which is 50.0 and 51.4 percent, respectively (City-Data, 2011a; City-Data, 2011b<sup>74</sup>). This suggests that the majority of residents in both communities are retired (or unemployed). Table 8.4 presents the average age of respondents.

**Table 8.4** Average age of Surveyed Residents in Brigus and Trinity

Age of respondent	Brigus (n=71)	Trinity (n=12)
<b>18-24</b>	1	0
<b>25-35</b>	3	0
<b>36-45</b>	4	1
<b>46-55</b>	12	2
<b>56-65</b>	17	3
<b>66-75</b>	19	3
<b>76 or older</b>	11	3
<b>No reply</b>	4	0

Approximately two-thirds of residents in both Brigus (67.6%), and Trinity (66.7%), are between the ages of 46 and 75 years old. According to the literature, lifestyle entrepreneurs are of all ages (Benson and O'Reilly, 2009), but, are most often middle to pre-retirement age (Jaafar et al., 2015; Milbourne, 2007; Stockdale et al., 2013). In both study sites, surveys reveal that the majority of residents are middle-aged retirees. Given this, and, that Brigus' and Trinity's rural

<sup>74</sup> 2011 is the most recent employment rate data available for Brigus and Trinity, Newfoundland and Labrador.

tourism trajectories emerged around the time of the cod moratorium, a greater number of local proprietors are expected.

Looking back, there are signs of early local involvement in tourism. After the closure of the cod fishery, the federal government responded with an immediate five year, \$500 million return to work strategy (Welbourn, 1995). The primary objective of the strategy was to retrain fishery workers in alternative occupations, and locate viable industries to substitute cod. According to Clair, at the Harris Centre, most fishermen did not have, nor did they require, a high school diploma because they worked in the fishery their entire life (personal communication, 2012). When tourism was proposed, many local residents were apprehensive about the idea of becoming a tourism community. This is not surprising, as one of the government's proposals was to permit licences for boat tour operators to promote cod-jigging as part of tourism packages. Locals criticized this tactic, which was perceived as an insult to their once traditional way of life (Welbourn, 1995), as Doody (1999) asserts, "government conservation policies aimed at promoting tourism now threaten the outport mode of living" (p. 73).

However, Clair explained that many people welcomed tourism to their community, because Newfoundlanders are inherently hospitable, and "we do culture here, very, very well" (personal communication, 2012). For example, he speaks of a local B&B owner in a remote town on the Northern Peninsula: "it's not just a bed and breakfast, you also get a supper, there is entertainment, the fellow tells stories" (Clair, personal communication, 2012). In an interview with Paul Mills, the Vice President of the Atlantic Canada Opportunities Agency, it was explained that "a lot of folks gravitated towards tourism and it is a fairly easy industry to get into. There is not a lot of competitiveness in terms of knowledge, infrastructure or proximity to natural resources or other types of things" (Mills, personal communication, 2012). As a matter of fact,

...every community saw themselves at having tourism potential...and a lot of what came forward as tourism projects were thinly disguised lifestyle projects for the locals, like walking trails, marinas, things that you would argue would significantly enhance the tourism potential in the region (Mills, personal communication, 2012).

On most occasions, locals could capitalize on their natural (e.g. whales, icebergs) and cultural (e.g. arts, historic infrastructure) assets (Mills and Grandy, personal communication, 2012). For this to succeed, governments "have invested pretty heavily in cultural industries, development,

and the idea is, if you have some of that taking place in a community, it becomes enough of a draw that the B&Bs and restaurants, and all the rest, can feed off that” (Mills, personal communication, 2012).

Still, only a few tourism-related firms were located in Brigus and Trinity Bight. Even then, only one of these businesses opened after the year 2000 (RV Park in 2012). Several in-migrants offered their opinions as to why more local residents are not opening tourism-related firms. In Trinity Bight, for example, a newcomer entrepreneur explained,

...they are not doing anything. They have gone from one extreme to the other. They are on the *cash economy* and if they are not working they are trying to get *pogey or welfare*....this is the thing about *not being highly innovative*, [it] comes from a time of *survivalist* before cash and roads...and it seems to be condescending but if you go back and think about this place 220 years ago when it was first settled, you have a *survivalist society*, meaning you figured out how to shoot a duck but you are not going to experiment ten different ways to shoot a duck...I think that people tend to *stay with the tried and true*. They may take something and they may adjust it but they don't go a whole new way (Gary, personal communication, 2012, emphasis added).

This in-migrant's theory is echoed by Anais (2009), who suggests that “During the cod crisis, the ethic of self-help discourses of the 1930s was resurrected, allowing the government to promote the “*informal economy*” as a new and radical response to the effects of unemployment...the notion of an outpost “informal economy” is a political tool rooted in the self-help movement of pre-Confederation Newfoundland” (p. 240). According to (Eisenschitz, 1997), “Self-help legitimates the disengagement of the state from welfare pointing towards the informal economy as a replacement” (p. 160, cf. Burns et al., 2004, p. 133). This was a strategy for neoliberal governments to reduce their responsibilities, while falsely accusing strict regulations and high taxes for increases in the informal sector (Williams, 2017).

In Brigus, another newcomer, and B&B owner, suggested that, for locals, “there is the *fear of not making a go of it*...if someone did open up, they would be supported” (Linda, personal communication, 2012, emphasis added). She continued to explain that a few locals sell baked pies, quilts, and crafts from their home, but,

Brigus was never a place to, the residents of Brigus are quiet and *conservative* and I think they love their homes and their family and their community and they are very friendly to people who come here, and they are happy to see the tourists here, but...I think truthfully, whether good or bad, most people in Brigus are happy with the status quo (Linda, personal communication, 2012, emphasis added).

To sum this up, the informal economy in Newfoundland expanded with neoliberalism. This, coupled with Newfoundland's long history of "'resistance' to change" (Singh and Devine, 2013, p. 7), reinforced rural path dependence in the primary sector. What is more, House (1998, 1999) suggests that Newfoundland's resistance to change stemmed from a population that developed around *government assistance* and transfers (e.g. tax credits), which, Baum (1999) claimed, resulted in a "*dependency culture*" (p. 64, emphasis added). Although Sullivan and Mitchell (2012) point out that "the adoption of neo-liberal policy in Newfoundland, as elsewhere, has forced civic groups and private entrepreneurs to assume greater control over the [tourism] industry", their findings show only a handful (4) of private-led tourism businesses in Ferryland (p. 39). By the same token, it is unknown whether these venues are operated by long-time residents or counterurbanites (newcomers or returnees).

An interview with Bill Grandy, Director General of International Business Development, at the Atlantic Canada Opportunities Agency, provided further details of interest. He offered an explanation for the lack of local tourism proprietors,

*Newfoundlanders grew up to a merchant*, typically in rural areas, so being an entrepreneur was not something that somebody typically aspired to, because, by and large, you are going to be hated by the rest of the community. That has impacted how we have had to approach entrepreneurship, and actually build that in over time, and give people a licence to actually consider that as a viable option (personal communication, 2012, emphasis added).

On the same matter, Gordon Cooke, an Associate Professor, in the Faculty of Business Administration, at Memorial University, pointed out that previous governments: "referred to it as 'cultural defeat' when you talk about this topic...suggesting that folks here, that there is not an *entrepreneurial spirit*" (Cooke, personal communication, 2012, emphasis added). Moreover, Cooke argued,

It is just the way people were raised. Generation after generation, there were fishermen and then there were merchants. You have people who are *financially conservative*, never had much money and had to really watch their pennies...they save their money, and that means that they are not going to go and take their money and invest it. It is just not going to happen (personal communication, 2012, emphasis added).

Others mentioned that many rural Newfoundlanders have had very *little exposure outside* of where they lived. Many have never lived away, nor have they had any reason too, so they have not experienced the world outside of their region. Therefore, rural populations have *limited*



*human capital*, or wherewithal, to start their own business. Further, a paucity of foresight inhibits the ability of locals to recognize opportunities (Grandy, personal communication, 2012).

Further insight, into the financial aspects of the tourism industry, was provided by Kerry Murray, the Director of Economic and Social Policy, with the Newfoundland and Labrador Labour Federation. He suggested that “a lot of people are not willing to work in a hot economy” because it is unpredictable (personal communication, 2012). Murray also disagrees that tourism is the savour of rural communities, “because it is low wage...plus, it is seasonal” (personal communication, 2012). Allison Dancey, with the Newfoundland and Labrador Craft Council, indicated that operating a full-time tourism business is nearly impossible without having another job to support your family. In addition, younger generations are moving away and are not interested in seasonal, low-paying, job opportunities. The risk involved with operating a tourism business is undesirable because of the industry’s seasonality, which makes it unpredictable in terms of the weather and the economy (personal communication, 2012). Adding to this argument, Mills claims, “in many respects, people might argue that it [tourism industry] is the fish plant of the 21<sup>st</sup> century (personal communication, 2012).

Although tourism is often touted as an alternative to the fishery (e.g. Baum, 1999; Fife, 2004a; Fife, 2004b; Springuel, 2011; Sullivan and Mitchell, 2012), some disagree that it is the “be all end all” to non-urban development, and, dismiss the notion that cultural tourism is the “only thing that is going to sustain rural Newfoundland” (Dawson, personal communication, 2012). This argument is supported by the Minister of Innovation, Business and Rural Development, who insists: “we deem all of our industries to be extremely important in rural Newfoundland and Labrador”; pointing to activities such as “ocean technology, educational institutions, the mining sector, and information and technology” (Hutchings, personal communication, 2012). Others highlight the province’s success at transitioning from a dominant groundfish (e.g. cod) to a predominant crustacean (e.g. lobster, crab) export industry<sup>75</sup> (Heneghan, personal communication, 2012). In addition to this, on parts of the Southern Shore, such as the Connaigre Peninsula, aquaculture has emerged as an economic stronghold, and provides year-round employment (Mills, personal communication, 2012). In spite of this, the oil

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<sup>75</sup> Shellfish represent over 80.0 percent of the total landed value of Newfoundland and Labrador’s fishery (see Department of Fisheries and Land Resources, Government of Newfoundland and Labrador, 2016); [http://www.fishaq.gov.nl.ca/publications/pdf/SYIR\\_2016.pdf](http://www.fishaq.gov.nl.ca/publications/pdf/SYIR_2016.pdf)).

industry remains the most significant economic engine in the province<sup>76</sup> (Murray, personal communication, 2012).

Some indicated that rural communities will abandon tourism for the opportunity to return to the fishery (Mills and Murray, personal communication, 2012). Grandy confirms this notion, stating: “if other opportunities emerge, tourism is generally the first industry that will be dropped” (personal communication, 2012). In fact, Mills adds,

...any area that has any potential for aquaculture, they are going to move away from tourism. Any place that has the potential for mining, they are going to move away from tourism, because you are just going to move up the value chain, I mean the wages are higher, they are year-round jobs, and there are only a few places in Newfoundland, not everywhere in Newfoundland has significant tourism potential. Only specific places, a number of regions and communities, have potential. So it is limited by geography and opportunity (personal communication, 2012).

This is not surprising, considering “economic policy in Newfoundland [has] consistently focused upon developing and expanding resource sectors” (Alexander, 1978, p. 56), and continues to do so today. This is demonstrated through their ambitious expansion for offshore oil, and self-described “Energy Warehouse” of “world-class industrial projects” in mineral, hydro-electric (i.e. Lower Churchill project), as well as renewable resource (e.g. wind, tidal) developments (Department of Natural Resources, 2017). Despite this, instability in the resource sector (e.g. decline of global oil prices in 2014) is a constant reminder to Newfoundland to diversify beyond the boundaries of their primary sector economy (Department of Finance, 2015).

This problem has not gone unnoticed. The provincial government is currently exploring strategies to break into new business opportunities, such as Information and Communication Technology (ICT) and developing the craft and gift sectors (Department of Tourism, Culture, Industry and Innovation, 2017a), while striving to “build a culture of entrepreneurship and innovation” (Grenfell Campus, Memorial University, 2017). With that said, researchers in Newfoundland have revisited the challenges that are prevalent in remote and peripheral locales (e.g. Cooke et al., 2013; Hall and Walsh, 2013). In rural areas, barriers to small and medium enterprise (SME) are normally associated with poor infrastructure (Siemens, 2007) stifled innovation, a weak knowledge economy, economic disadvantages (e.g. transportation), isolation, and insufficient capital; all of which can create an unfavourable environment for entrepreneurs

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<sup>76</sup> As of 2016, oil and gas remains the most significant contributor to the province’s GDP (see Government of Newfoundland and Labrador, 2017; <http://www.economics.gov.nl.ca/E2017/OilAndGas.pdf>).

(Albrecht, 2010; Joppe and Brooker, 2013). Yet, the abundance of in-migrant entrepreneurs, who have succeeded in rural parts of the province, refutes the absence of local tourism operators as being nothing more than an anomaly.

With all things considered, it is determined that under the conditions of increasing opportunities in alternative primary sector employment, local residents 'causal powers' (e.g. disinterest in tourism entrepreneurship created from a lack of entrepreneurial spirit, history of E.I./subsidies dependence, limited capital, availability of resource sector work etc.) has generated a 'path-reversion' mechanism. Path-reversion is proposed as a reversion back to an original path. Where path-extension (layering) innovates and diversifies within a firm environment (i.e. within a cluster of businesses) by adding or removing businesses or technology, and path-renewal (conversion) innovates and diversifies within an existing firm (e.g. reinvents products and services to adapt to changing market conditions to remain competitive), path-reversion ('combination') indicates a reversion back to an original industry that was once exhausted (i.e. primary sector to tourism back to primary sector). The 'path-reversion' mechanism, and its process of 'combination', is explored in more detail in Chapter 9.

Indicated earlier, an event mechanism (resulting in more local resident tourism entrepreneurship) may have otherwise been released, through the activation of different causal powers, if it were not for more recent opportunities (i.e. conditions) for locals to abandon tourism for primary sector industries. While aspects, such as limited financial capital and industry seasonality impose barriers to local residents' entry into the tourism market, the presence of some tourism businesses (e.g. Trinity Cabins, Brigus café) prove it is otherwise possible. Moreover, research findings support extant literature, which suggests tourism is perceived as a positive source of socio-economic development in rural Newfoundland. As such, cultural heritage tourism appears to be favourable to non-locals and locals, but for locals, it is not the preferable industry to work in. Thus, the next section examines how counterurbanites are furthering the tourism trajectory.

#### **8.4 Brigus Path-Exhaustion, Trinity Path-Renewal**

Thus far, this chapter has demonstrated that civic groups are responsible for driving their communities' tourism trajectories. Incidentally, few locals proceeded to open private-led tourism businesses. Instead, counterurbanites have taken advantage of existing infrastructure (e.g.

historical sites), to expand and diversify the region's tourism products and services, and, in turn, stimulate path-renewal through innovation and extra-local capital. Though counterurbanite entrepreneurs were present at both research sites, development unfolded differently in Brigus than it did in Trinity (Bight). The main distinction in Trinity is the formation of a tourism cluster, now informally known as the region of Trinity Bight, and, a disproportionate number of newcomers than Brigus. This section, therefore, unpacks how and why regional development and tourism clustering occurred at just one of two study sites.

#### **8.4.1 Demi-Regularity 3: Newcomer-Led Peripheral Tourism Clustering**

Many believe that the differences between rural communities are related to organic growth. For example, Heneghan, a Tourism Development Officer, expressed: "I think that for the most part, it happened organically, probably because it was coming out of the community, whether it was the arts community or the physical community, people were talking at the ground level and that is how they got there" (personal communication, 2012). Communities that demonstrated the desire and potential to become tourism destinations were allotted funding; two examples are "Brigus and Trinity because they are primary tourism industry towns, they don't exist on any other industry based on their full time population, and there really is no other game in town" (Heneghan, personal communication, 2012). However, Heneghan argues, there "are people in certain areas that have clusters of assets [e.g. cultural, natural], and they develop that way. We have people who ask us for money for projects, but what has happened again over the course of 15 to 20 years, is that there is now a critical mass of stuff in certain areas" (personal communication, 2012). Adding to this, Mills at the Atlantic Canada Opportunities Agency, suggests, "growth poles can be region-specific in terms of only certain communities such as Trinity have the history and the geography" (personal communication, 2012).

According to the statements above, local assets (e.g. history) and geography, play an important role in regional development. A probe into these place-based characteristics, finds, that geography, or location, is an important indicator of tourism success. Interestingly, two findings illustrate the relationship between tourism cluster development and proximity to an urban area (i.e. St. John's and surrounding area): vacation vs. retirement, and day-trip vs. overnight, destinations.

Brigus and Trinity cater to two different consumer cohorts. This was discovered during a conversation with the Mayor of Trinity. He explained,

Trinity has always been a place that people just go for vacations. There are people that have been going there for generations. The Trinity Cabins opened in 1948...there are three or four generations that go to Trinity Cabins. In terms of local Newfoundland, it has always been a big destination, and [for] people from outside Newfoundland. Trinity is considered a Tier 1 place to go according to a study of places-to-go in Newfoundland for locals to Newfoundland and non-locals to Newfoundland. Word of mouth, it has just become a destination alone. We put very little money into marketing. It's just done it on its own (Mayor of Trinity, personal communication, 2012).

Conversely, Mills argues, Brigus "is a place where people from St. John's go on the weekend. I don't think they get a huge amount of extra-provincial visitation, whereas Trinity does" (personal communication, 2012). Grandy added to this notion, indicating "Trinity is a genuine tourism destination. Brigus is an elite St. John's community" (personal communication, 2012). This is because communities which are urban-adjacent have less business activity than those further away. Yet, Ferryland would see the same number of non-resident tourists as Trinity, whereas, Brigus does not. Oddly, Ferryland, like Brigus, has little business development (Grandy, personal communication, 2012). On the topic of Ferryland's tourism industry, Heneghan stated: "Why is there not more development? You have the dig there [Colony of Avalon], the picnic place...that is a place that shocks us as to why there is not more development. Even the two B&Bs there don't even take credit cards. It's like, how can you be in the tourism industry and not take a credit card?" (personal communication, 2012).

Duration of a tourist's stay is another potential reason explaining why communities in close proximity to St. John's have fewer tourism amenities. A study conducted by a Canadian consulting group provides further insight. Brigus has been identified as a Tier 2 level with respect to development potential. According to the 2004 *A Special Place a Special People: The Future for Newfoundland and Labrador Tourism* strategy document, "'tier 2' destination areas/communities have some, but not sufficient critical mass of anchor attractions, secondary attractions and/or services but they have the potential to rate well on the criteria if some indefinable and feasible things can be done to enhance their rating" (The Economic Planning Group of Canada, 2004, p. 140). Therefore, Brigus is one of several communities that should receive further investment. And, development ought to focus on expanding existing amenities and services (The Economic Planning Group of Canada, 2004). One of their suggestions was to

“strengthen and expand the theatre program” to attract overnight, as oppose to day-trip, visitors (The Economic Planning Group of Canada, 2004, p. 244). They also stressed the importance of “a concerted and co-operative effort among the various players in the tourism industry”, and, a “directional signage program, packaging and cross-marketing to link the communities and heritage experiences of Cupids and Brigus, along with the southern part of Trinity Bay<sup>77</sup>” (The Economic Planning Group of Canada, 2004, p. 244).

The report found Trinity/Port Rexton (Trinity Bight) to be one of four “destination communities/areas” recognized as a Tier 1 level tourism destination (The Economic Planning Group of Canada, 2004, p. 139). Other Tier 1 level designated areas are St. John’s, St. Anthony (L’Anse aux Meadows), and Gros Morne National Park (The Economic Planning Group of Canada, 2004). This indicates that Trinity Bight is among the top four most popular tourism destinations in the province, which includes the capital of Newfoundland and Labrador. Tier 1 designation regions “have major attractions, as well as clusters of complementary features that currently provide a critical mass of tourism appeals and significantly influence demand, length of stay and spending in the region in the province” (The Economic Planning Group of Canada, 2004, p. 139).

Indeed, Brigus has not developed to the extent of Trinity (Bight). Distance from St. John’s is one factor that has contributed to uneven development (i.e. Trinity is not a day-trip destination). Also, Brigus is a retirement destination because of its close proximity to essential services (e.g. hospitals) and a population-base that maintains year-round services. Therefore, more in-migrants to Trinity Bight can be explained by its seasonality, where non-locals are most often ‘tourists’ before becoming ‘entrepreneurs’.

However, other urban-adjacent regions are experiencing high rates of tourism visitation (e.g. Ferryland). Perhaps, then, there are other factors contributing to tourism clustering in more remote (e.g. Trinity Bight), as opposed to urban-adjacent (e.g. Brigus/Cupids/Trinity Bay Area), areas of the province. Furthermore, tourism clustering in Trinity is expanding throughout the northern half of the Bonavista Peninsula. In recent years, the Bonavista Peninsula has become an attractive location to young entrepreneurs, as cited in numerous news articles: *Millennials flock*

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<sup>77</sup> The location of Trinity Bay being referred to is situated on the opposite side of the bay from the town of Trinity. Therefore, this does not imply linking Brigus and Cupids to the region of Trinity Bight (Researcher’s notes).

to rural Newfoundland<sup>78</sup> (Bonavista), and *Meet some young entrepreneurs bringing new life to rural Newfoundland*<sup>79</sup> (Port Rexton), are just some. The remainder of this section explores whether or not clustering is a result of a higher concentration of newcomers, and, if so, what is the generative mechanism driving this regional development. Before this is determined, a brief history of regional development policy in Newfoundland is required.

In Chapter 3, House (2001) was referenced to explain the difficulty of implementing regional development efforts in Newfoundland. He indicates that this is because of the large number of outport communities that are spread across remote and peripheral areas of the island, which make it challenging to coordinate strategies that adhere to the needs of individual communities (House, 2001). Daniels et al (2013) builds on the social dilemmas of implementing regional development, since there “is a sentiment among many communities which presents a *fear of amalgamation* with others and *subsequent loss of identity*” (p. 16, emphasis added). This concern was expressed by the Founder and Artistic Director of Rising Tide Theatre,

People talk around regional cooperation and all that, and sure it’s all great until you have to give up something [laughs]. It is just a lovely idea, until you have to lose something. I think that it is better than it was originally, but it still has quite a distance to go in my opinion. Regional cooperation is still a long way from being in place, better than it was, but not what it needs to be. They [*communities*] *don’t want to be grouped or lose [their] identity* (Bonnie, personal communication, 2012, emphasis added).

Freshwater et al. (2011) concur, suggesting that community independence is something that is cherished in rural Newfoundland. Unfortunately, in the past few decades, changing economic circumstances (e.g. fishing unemployment) have forced remote and peripheral communities to collaborate with each other (Hall et al., 2014; Krawchenko, 2014). On top of this, multi-community reliance on services (e.g. one fire station) has been guided by provincial and federal financial incentives (Department of Justice and Public Safety Municipal and Intergovernmental Affairs, 2014). Mills contends “there is sort of a quiet social engineering going on here. The cost to the provincial government in terms of transportation, social services, health care, education, is enormous because we have over 500 places where people live and a lot

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<sup>78</sup> O’Neill-Yates (2017) <http://www.cbc.ca/news/canada/newfoundland-labrador/millennials-rural-newfoundland-trend-lifestyle-bonavista-trinity-1.4344151>

<sup>79</sup> Walsh, (2017) <http://www.cbc.ca/news/canada/newfoundland-labrador/candice-walsh-young-entrepreneurs-1.3924389>

of these places are not even incorporated communities” (personal communication, 2012). Of concern for some, are government initiatives that promote collaboration between rural-urban settlements; igniting familiar anxieties felt during the resettlement era (Daniels et al., 2013). Add to this, “messages of encouraged collaboration with other communities, especially if they come from outside the community itself, can often be perceived as a threat to identity” (Daniels et al., 2013, p. 16). Nevertheless, rural communities are slowly adapting to restructuring. This is, in part, out of fear of losing their community altogether.

In 1996, Regional Economic Development Boards (REDBs) were established to help navigate on-the-ground resources for social and economic development, and to restructure existing services (Vodden et al., 2014). Around the 1990s, according to the Department of Tourism, Culture and Recreation, there was “a lot of government investment, but with that, there is policies, governments role there, is also, primarily, to establish the policies that allow for the proper growth and development of many sectors. So that is part and parcel of what the government’s role is, is to try and create the environment where those things can happen” (Dawson, personal communication, 2012). Despite good intentions, many have criticized REDBs for their mismatched partnerships, and unequal representation among regions, which has proven to be highly dependent on availability of local resources, existing relationships, and levels of interest among community actors (see Daniels et al., 2013; Hall et al., 2017). Further tensions stem from the lack of long-term vision; described, rather, as reactionary mitigation measures to forecastable events. Perhaps, most impeding, was the inability of external stakeholders to delegate responsibilities at the local level. Moreover, Daniels et al (2013) indicate that despite exogenous-endogenous consultation, governments “maintain power in terms of regulatory as well as technical capacity”, because local groups are “frequently constrained by lack of human and financial capital” (p. 16).

Since the dismantling of REDBs, provincial and federal governments have placed more emphasis on private sector development (Vodden et al., 2014; Mills, personal communication, 2012), and are committed to maintaining “support to organizations by way of non-repayable contributions for projects aimed at supporting economic development, innovation and capacity building in all regions of the province” (Department of Tourism, Culture, Industry and Innovation, 2017e). Greenwood (2013) explains, that the reaction from rural regions is that of “community-based organizations...crying out for more resources” (p. 46). Hall et al (2017)



described the dismantling of REDBs as a shift in rural policy from “dysfunctional to destitute” (p. 58).

Despite these claims, others are optimistic about the decision to discontinue REDB support, which shifts its focus from community-based civic groups to private entrepreneurs. This is necessary because of federal reductions, and subsequent provincial elimination, of REDB funding (Gibson, 2013). For example, Gibson (2013) argues that now “there is an opportunity to engage in a regional dialogue about the desired future of regional development and the opportunity to advocate for regional development strategies and agencies that are place-based and complement regional priorities” (p. 41).

Alternatively, Mills, who represents a federal funding agency (ACOA), argues, ...if you are looking at cultural tourism and cultural industries, there is the issue of quality of products and a lot of that can come back to the strength of the artistic animator embedded in the product... So we don't just look at the natural attraction in the community, if we are looking at funding, for cultural tourism products, we want to see that they have both the *artistic capacity* to provide a world class experience and a business accrument to try to run this thing in such a way so that there is even half a chance of it being sustainable. Sustainability is a huge issue for us. A lot of these things are still marginal (personal communication, 2012, emphasis added).

There have been disagreements, however, about the ethical consideration that “quality and culture is everyone's resource, but not everywhere can be equally successful. You have a cannibalization of the industry when every little region wants their museum” (Mills, personal communication, 2012). Unfortunately, though, economic circumstances have changed, so money distribution has changed. At the time of the cod moratorium, much non-repayable money went into a lot of community-based infrastructure. For example, in Trinity, and on the Bonavista Peninsula, there has been a gradual shift away from these projects into the private sector (Mills, personal communication, 2012). Mills explained: “our approach to rural economic development, and our cuts to funding of zonal boards, is more about our policy and approach rather than being driven by budgetary considerations” (personal communications, 2012). Grandy added that,

...one of the key things that we looked at in the past year is alignment with how do we promote small and medium enterprise development. One of the things when you look at all the activities that we have done, when you look at one of the challenges on the community side, is our deviation from that. And a lot of the activities that REDBs were involved in were high on the community side, less on the economic side, and we had to kind of realign our resources to focus very much on the economic (Grandy, personal communication, 2012, emphasis added).

To understand how this translates to provincial responsibilities, information was sought from the Ministry of Innovation, Business and Rural Development. When asked how the dismantling of REDBs will affect the province's approach to rural development, Hutchings replied,

So I think what you will see, and what we are going to do, is we are re-defining what that *local capacity* is on the ground, if needed, what existed outside of REDBs. So that capacity is still there, it may look differently, but at the end of the day, the end result will be there, and we will continue to get the input for that capacity on the ground. It may be called something different, but it is coming, it is there, we are working, and as I said with our suite of programs, we will continue to fund the volunteer sector to do what we have always done and even continue to do so at a higher level (personal communication, 2012).

The Department's Assistant Deputy Minister added: "in some cases, they [REDBs] may carry on for a while but it is not so much what the structure is, it is what the core activities are" (Malone, personal communication, 2012). Local actors appear to agree that there are necessary changes to rural development policy. The Mayor of Trinity stated,

...we could be doing more, the province is maxed out. Every community has a museum...there is more work to be done though...we could be partnering more. Everyone now is doing tourism in the province. It is almost to the point now where there is a fear because it is almost maxed out. The pie is being divided almost too much and we are seeing it all around (personal communication, 2012).

To recap, regional development goals have been hindered by the resistance to consolidate services, and loss of community identity. Though REDBs were beneficial for breeding new attitudes of regional cooperation, their collapse now leaves communities to fend for themselves. Regardless of how new rural policies unfold, it is undeniable that in-migrants have acquired some responsibility for filling this void. For example, despite dwindling funds to REDBs over the years, regional development has had great success in Trinity Bight through renewing tourism products and services. However, the same cannot be said for Brigus, or others communities (e.g. Ferryland).

The ratio of local to non-local tourism businesses was brought to the attention of public sector stakeholders. In response to the dominant presence of newcomers in Trinity Bight, the Vice President of ACOA stated,

I think those people had more of a sense of what the opportunity was earlier on, they had more of a *global awareness*, they saw the value of what was there and how it could be exploited because those people were probably more in tune with business, more in of a sense of what the demand would be out there. It is not an uncommon

thing you know, that people from away can often see the opportunity greater than those who are actually living in the community (Mills, personal communication, 2012, emphasis added).

This belief is shared by others, such as Minister Hutchings,

I guess that it goes back to our culture and environment. People seem to come here and fall in love with it. And we see a lot of people who come here to retire. And some of them are in communities that have an older population, they come and fall in love with a spot and buy a home and move here. Then there are *people who come here and fall in love with the place and they want to start a business*. And we have seen a lot of that, in terms of economic development it is great, keep coming, we will take them and we will assist them just like anybody else. From a cultural point of view, *it adds to our diversity, new people, different ethnic backgrounds*, it is fabulous, so for us we just view it all as a positive. We are delighted to have them, and we certainly see a lot of it in the tourism industry (personal communication, 2012, emphasis added).

The Director of Arts, at the Department of Tourism, Culture and Recreation, believes that:

...sometimes it takes *an outsider to recognize an opportunity*...If I go somewhere, I can see an opportunity easier than I can see in my own place...for example, [Gary's Inn], good example, successful business, and I think it was a case of that they recognized something...They probably had a little bit of *money to invest*. They had the *expertise*. I think it was as simple as that (Dawson, personal communication, 2012, emphasis added).

Demonstrated above, newcomers are often associated with increased innovation, financial and cultural capital, and business know-how. This is not to suggest that returnees are not innovating, nor that they lack cultural or financial capital. Rather, newcomers possess a unique ability to envision opportunities, which could be linked to their impartial relationship to the island's historic socio-economic struggles, and personal identities attached to outport communities. In other words, newcomers are not embedded in local establishments or mentalities that constitute pre-existing "institutional thickness", or the experiences that create emotional attachment to any one community, both of which can prolong lock-in in path dependent regions. This ensues from "agencies and government entities 'crowding' each other out and distracting growth efforts" (Beer and Lester, 2015, p. 205), and can create "vicious cycles of suboptimal development trajectories through institutional lock-in" that limits a region's ability to "anticipate" or "respond" to economic crisis (Rodríguez-Pose, 2013, p. 1041).

Now, 'institutional thickness', a term originally coined by Amin and Thrift (1994), is an ambiguous concept, in the sense that it can be used to describe positive or negative development.

For example, it can encompass collaborative governance and networks of information accumulation and transfer, which is beneficial in remote and peripheral regions. To achieve positive growth,

The focus on information and knowledge has to be seen, in addition, as part of a wider aim of encouraging learning and adaptation across the industrial and institutional base, so that local path dependencies can be built upon or challenged through strategic goal monitoring actions and rationalities of behaviour (Amin and Thrift, 1999, p. 304).

In this event, ‘institutional thickness’ is viewed as a positive “measure of the degree of which a geographic location is capable of supporting productive economic activity” (Blundel and Lockett, 2011, p. 371, see also Amin and Thrift, 1994). On the contrary, ‘institutional thinness’ may be found in areas that, for example, have undergone “civil war or a major natural disaster” that has resulted in “few public, private, or voluntary institutions to encourage economic activity, no effective interaction between whatever intuitions exist, and no systems in place to enable knowledge to be shared” (Blundel and Lockett, 2011, p. 371). Given that Trinity Bight has maintained relations between civic groups and local and provincial governments, this definition hardly applies.

However, ‘institutional thickness’ in path dependent regions can also exhibit self-reinforcing structural lock-in (political or cognitive), which suggests “decisions become embedded into institutional arrangements”, and thus difficult to halt or reverse (Gill and Williams, 2016, p. 50). Political lock-ins can have negative implications since a common “worldview or mindset” may also become embedded in “social relationships that link people to institutional environments” (Gill and Williams, 2016, p. 50). Cognitive lock-ins manifest in entities, such as political administrations and powerful corporations, where “behaviour, such as norms, rules, and written and unwritten laws...serve to preserve existing traditional structures that, in the interests of continuity and retention of power, constrain rather than nurture innovations” (Gill and Williams, 2016, p. 50).

Lock-ins can thus be linked to social aspects, such as resistance or inability to change, and can dictate the direction of regional development, which can become clouded and fragmented, and dissolve the capacity at which stakeholders comply with each other (Underthun et al., 2014, p. 122). A newcomer to Trinity Bight provided an example of this. He referred to a recent independent tourism study, which advised the province to “build up three or four regions”, and

then focus on developing other areas (Gary, personal communication, 2012). However, at the time, the Minister of Tourism found that it didn't benefit the community where he was elected. As a result, the study was never considered. This is "political contamination", Gary suggested, indicating that they need to hire a tourism consultant with an unbiased opinion (personal communication, 2012). Yet,

I am considered a loose cannon when I talk about this because the bureaucrats circle back to me and say, well, government is the best way to run tourism... they don't even want to discuss it...unless you live in a world with dialect, you are not going to move forward. It is zone-a-phobic, defensive, very politicised, and all of that gets in the way of a fluid development of tourism...the other thing is that government has grown very big in those places, because of the outmigration of intellectual capital we have, the people here are very weak and they are scared to push back against government, so government has grown into an ever more dominant thing (Gary, personal communication, 2012).

The example above illustrates provincial government political lock-in, where members of parliament are particularly invested in their electoral district. Also, a decline in human capital has created cognitive lock-in that limits the ability for locals to enact change. There is evidence of this in Newfoundland's "small-scale verses large-scale fisheries controversy", where "stakeholder perceptions of the problem and solution differ" (Jentoft and Chuenpagdee, 2009, p. 557). Jentoft and Chuenpagdee (2009) argue that "solutions have consequences that are not easily reversible because they create path dependency", and therefore "the idea of adaptive governance and corrective feedbacks with inbuilt learning do not work well" (p. 557). To put it another way, corrective measures are sometimes insufficient for unsolvable problems. In these circumstances, a radical new approach to regional governance is necessary to avoid path dependence.

As such, in the case of Brigus and Trinity Bight, 'institutional thickness' requires radical innovation so that rural tourism does not become "just another staple" (Schmallegger and Carson, 2010, p. 201) of Newfoundland's export economy. Though many capitalize on local capital, mirroring the region's industrial past, newcomers, as seen above, are less inhibited by restraining factors such as localized cognitive and political lock-ins, and are more likely to envision new opportunities and alternative development strategies, as well as, engage in layering and conversion processes through innovation as seen below.

Local residents are conditioned to the environment of life in Newfoundland. Even returnees are influenced by their past, either politically, or socially (e.g. identify strongly with

their home community's norms and values). Relatedly, "cultural embeddedness can be related to cognitive embeddedness, since many of the structured regularities of mental processes that generate cognitive embeddedness may also result from shared cultural understandings stemming from social interaction and imitation" (Hite, 2011, p. 254). What is more, together "cultural and cognitive embeddedness shape the actions of network actors and network patterns of social relationships; structures of social relations also reciprocally affect culture and cognitive contexts" (Hite, 2011, p. 254).

Efforts have been made to combat this,

...regional development officers play a role of fostering new ideas or partnering with the private sector or vice versa, getting them to think beyond their B&B per say, and create other linkages...we are always trying to encourage groups to do this, and be non-traditional, who can you partner with to make things more viable (Heneghan, personal communication, 2012).

Still, newcomers have the advantage of "*cross-cultural experience*", which increases their ability to visualize business opportunities (Vander and Franke, 2016, emphasis added). Over the years, an influx of tourists has created a demand for restaurants, since, traditionally, dining-out was uncommon in Newfoundland culture (Dawson, personal communication, 2012). Incidentally, this provided opportunities for locals, and newcomers alike, to lay the blueprint for restaurants in rural areas. Not surprising, eateries and cafés established around local foodstuff (e.g. cod). Yet, *innovation*, brought on by newcomers, led to *diversification* through layering; "the finer food has come about because of the demand of tourists...it is just that there wasn't a big opportunity [before tourism], but they [newcomers] recognize what is a smart business opportunity, to make your business a bit unique, for the tourist" (Heneghan, personal communication, 2012).

As new spin-off firms appeared, some existing businesses reinvented themselves (conversion) to remain relevant to incoming competition. In Trinity Bight particularly, restaurants and cafés converted their products and services to compete with other firms (e.g. gluten-free, sommelier). This has resulted in "huge investment, for creative communities who we saw the need, since, more and more now, you see the true private entrepreneur, doing it on their own, i.e. the chocolate shop in Trinity who did it on their own, they can do that because of the development that is already there" (personal communication, 2012). Other innovations include the unique satellite gallery at [Gary's Inn], which "totally enhances the visitor experience at no cost to them, because it is juried. But it provides that service to the guest without them having to

get into the retail part of it” (Heneghan, personal communication, 2012). At the same time, they can use local artwork to decorate the inn, “and they have all this pent up demand from artists who want to put their stuff there because they know they have a good chance of it selling” (Heneghan personal communication, 2012).

Clearly, stakeholders have a heightened awareness of the value of newcomers’ *know-how*, and *financial* and *cultural capital*. This is evident from the amount of investment in Trinity Bight that was mentioned by a number of interviewees. Perhaps, then, investing in newcomers is one solution to filling the gaps recognized with REDBs. More important, newcomers are creating structural changes to local intuitions, such as new knowledge and experiences (i.e. cognitive), and attracting investment from, and creating networks with, local and national governments (i.e. political). What is more, the key to renewing clusters in “mature regions and industries” is “a renewal of networks”, which includes “new links with knowledge supplies as well as innovation networks among companies” (Tödtling and Trippl, 2004, p. 1178). Newcomers are almost exclusively responsible for extending and renewing Trinity Bight’s cluster (i.e. layering, conversion). This is to be expected when “local networks of dominant industrial production become so narrowly focused on a particular type of retrogressive economic activities that it is unable to shift into a new restructuring track” [e.g. primary resources, absence of local business owners] (Crespo et al., 2014, p. 201). Yet, returnees were found to contribute to tourism development, and, in a few cases, engage in layering (Brigus: modernized B&B in; Trinity Bight: café with unique food), and conversion (Brigus: gluten-free products; Trinity Bight: spa and wine bar). Thus, a final task is to determine if other factors were contributing to regional development and tourism clustering, as observed in Trinity Bight.

A theme emerged during conversations with key informant stakeholders. This theme centred on the non-business contributions of newcomers to their community. For example, a Tourism Development Officer pointed out that newcomers are “*big supporters of the art community*, [Gary] and [wife] are *great partners and very supportive*” (Heneghan, personal communication, 2012, emphasis added). By way of illustration, in 2015, Gary became CEO of a new non-profit in Newfoundland. The organization “drives economic development and fosters partnerships between our business and arts communities”, based on the principal that arts should lead development strategies in Newfoundland, to: enrich lives, attract talent, advance innovation, and drive economic growth (anonymous, 2017).

Another example is highlighted from conversation with the Department of Tourism, Culture and Recreation,

...although the town of Trinity doesn't have many permanent residents...[the] whole area has flourished with the influx of summer people. Some of them tend to be year-round people and they have made big contributions, like [Gary] and [Bonnie]. Those people are not from that area. But, they have made a big contribution to those areas (Dawson, personal communication, 2012, emphasis added).

Bonnie's annual *Seasons in the Bight* performance, for example, gave the *region its cluster identity* (i.e. Trinity Bight). This was a strategic approach to enhancing regional development, and has been recognized, among other development efforts, through numerous awards (Community Sector Council of Newfoundland and Labrador, 2010a), and an honorary doctorate for "her contribution to the development of Newfoundland's theatre, tourism, and rural economy" (Memorial University, Marketing and Communications, 2017, emphasis added).

Two business participants from Trinity Bight, in particular, were praised by Heneghan, ...people like [Tracy] or [Gary], who have workers that are irreplaceable for five or six months of the year, that are part of the visitor experience. *People want to come here and meet the locals* and that is a great way of doing so, *employing local people*, there has to be some sort of incentive for these people to want to stay in these rural communities because without them, what do you do? (personal communication, 2012, emphasis added).

Using this example, the majority of Tracy's staff were local to the area, and have been employed at her inn and restaurant for many years; "we have always had a few students...and we need to get permission from their parents, but we know them, it's a small town here. But we have had, three times, kids have started before they were even 12 here, with their mother's permission" (personal communication, 2012, emphasis added). Tracy has provided them the opportunity to remain in their community by teaching them new skills; "They were hard workers. These kids know how to work because they were raised in fishermen families. Then they grew older and they could serve wine" (personal communication, 2012). Also, employing local people enhances the authentic experience for guests (e.g. local knowledge), and *creates a bridge* between older residents and newcomers, which can help them become embedded in the community. In transitioning path dependent regions, an embeddedness perspective<sup>80</sup> seeks to "consider how

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<sup>80</sup> Embeddedness Perspective, originating from Granovetter (1985), examines how "behavior and institutions are affected by social relations", and "economic action is embedded in structures of social relations, in modern industrial society" (p. 481).



relationships affect people's experiences with, and interpretations of, the changes occurring in their communities" (Tigges et al., 1998, p. 204). Furthermore, Koster (2008) suggests:

By combining the ideas of embeddedness with place, economic actions can be understood as being inextricably and uniquely tied to the *socio-cultural relationships associated with a particular community*... Institutional thickness... refers to a whole pattern of life in which *members are engaged and share a common purpose*, cultural norms and values and in which it is impossible to distinguish between economic and social relationships. Institutional thickness establishes *legitimacy and trust*, continues to stimulate entrepreneurship and consolidate the local embeddedness of industry (p. 164, emphasis added).

Shown above, newcomers have created networks and partnerships within the region through community contributions (e.g. forming non-profit groups) and the desire to enhance local economic and social development (e.g. marketing "Trinity Bight" as a region). Also, building social relationships with community members (e.g. employing local children) fosters acceptance and creates an environment of *social trust*, in turn, strengthening local institutions. Possibly, these methods of integration are invoked by "the innate desire for in-migrants to *become accepted* in their new localities" (Bosworth and Willett, 2011, p. 204, emphasis added). Given this, local networks and embeddedness can create a "bridging mechanism... at the community level where '*known strangers*' bridging the boundaries between a local impoverished community and outside resources enabled community development that would have been impossible through the agency of the locals alone" (Korsgaard et al., 2015b, p. 557, emphasis added). In other words, newcomers, as 'known strangers', can permeate barriers between local (endogenous) and government (exogenous) approaches to rural development; thus acting as an appropriate substitute to unfavourable conditions of REDBs.

Stated earlier, regional development is difficult to implement in rural Newfoundland, because communities are often fearful of losing their identity. Moreover, amalgamation and reallocation of resources/services are challenging since "messages of encouraged collaboration with other communities, especially if they come from outside the community itself, can often be perceived as a threat to identity" (Daniels et al., 2013, p. 16). Perhaps, then, newcomers (known strangers) breed an environment (bridging mechanism) that is perceived as less threatening to locals than traditional top-down sources. If this is true, newcomers can foster regional development by helping locals acclimatize to collaboration and networking with surrounding communities through social trust and leading by example...

...leadership for regional economic development will not be based on traditional hierarchical relationships; rather it will be a *collaborative relationship* between institutional actors encompassing the public, private and community sectors – and it will be based on mutual trust and co-operation (Stimson et al., 2002, p. 279, emphasis added).

It is concluded, then, that investment in the private sector attracts counterurbanites with the capital and know-how needed to operate a tourism business. Newcomers, in particular, are innovative and detached from cognitive and political lock-in; something Daniels et al (2013) found lacking in local residents in rural parts of Newfoundland. Innovation draws investment from governments because it leads to spin-off activities and creates diversification. Under the conditions of geographic isolation (and barriers to isolation), newcomers to Trinity Bight must network and build relationships to gain acceptance and local knowledge for business success. Also, regional cooperation is essential for survival of rural communities. Newcomers, therefore, can act as mediators between top-down and bottom-up barriers.

As such, the generative mechanism responsible for regional development is geographic isolation/barriers. More specifically, under the conditions of decreasing government funding, failed implementation of certain components of REDBs, and increased investment into creative communities/innovative private sector initiatives, newcomers 'causal powers' (e.g. cross-cultural ability to see opportunities, detachment from political/cognitive lock-ins, desire for acceptance and belonging) were activated, which, in turn, is produced through a geographic isolation/barriers generative mechanism. Put another way, as outsiders, newcomers have the ability to see an opportunity more so than locals within a community. In addition, newcomers are detached from the emotional attachment of saving one particular community, and, are not restrained by cognitive and political lock-ins like locals and returnees alike. Because of this, they are more receptive to amalgamation and cooperation, which is necessary because of Trinity Bight's geographically isolated location. Taken from the outsider-insider theory, Daugstad (2008) suggests, an "outsider is often not attached to a specific landscape, [and] has no or very limited situated knowledge about the social fabric "behind" it (how it is produced and maintained)" (p. 406). With this considered, newcomers' desire to become part of the local community, their ability to see opportunities from an outsiders perspective, and detachment from the local socio-economic history (lock-ins), has created increased local-counterurbanite social trust and relationship building.

## **8.5 Conclusion**

The explanatory research model was employed to determine and examine three event demi-regularities. Through the process of retroduction, demi-regularities were assigned causal powers by going back and forth through more empirical data and once again comparing it to the literature. Counterfactual thinking was employed to determine the most likely generative mechanism that manifested under the conditions, structures and their causal powers, to produce these observed events. Table 8.5 is a conceptual framework that illustrates the process to which these conclusions are drawn through the explanatory research model. An explanation of this conceptual framework follows.

**Table 8.5** Conceptual Framework of this Study through the Explanatory Research Model

Knowledge domain	Level of reality	Component of abductive/retroductive processes	Demi-regularity: 1	Demi-regularity: 2	Demi-regularity: 3
Concrete	Theory (epistemology)	Suite of concepts and ideas	(all research data)	(all research data)	(all research data)
Abstract	Empirical (abstract of empirical experiences) (stratified ontology)	Object with a structure	Civic sector as initial drivers of path-creation ( <i>structure</i> : members of civic groups and volunteers)	Low participation of local residents in tourism entrepreneurship ( <i>structure</i> : tourism business network)	Newcomer-led peripheral clustering ( <i>structure</i> : counterurbanites)
Abstract	Empirical (abstract of empirical experiences) (stratified ontology)	Conditions	Government funding; Lack of alternative economic opportunities	Alternative options in primary resource industries	Discontinuation of REDBs funding; Government investment in creative communities
Abstract	Actual (events) (stratified ontology)	Structures' causal powers	Resistance to resettlement and amalgamation; Loss of identity; Strong community spirit and traditions; Culture of volunteering and communal help; Sense of pride	Lack of entrepreneurial Spirit; History of dependence on E.I./subsidies; Conservative/not risk takers	Outsider perspective; Uninhibited by cognitive and political lock-in; Bridge builders between government and communities; Desire to belong/fit in
Abstract	Real (mechanisms) (stratified ontology)	Mechanisms that manifest to produce events	Collective diasporic identity	Path-reversion	Geographic isolation/barriers
Concrete	Theory (epistemology)	Outcomes	Cultural positive lock-in	Return to primary sector activities	Local/counterurbanite collaboration/social trust

Results found that civic groups in both Brigus and Trinity initiated the local tourism path trajectory (demi-regularity # 1). Explanatory analysis reveals that civic groups, as structures, have a number of causal powers (e.g. community spirit, resistance to resettlement and amalgamation), which, under certain conditions (i.e. few economic alternatives, government funding for tourism), manifests the generative mechanism (i.e. collective diaspora identity) that produced the event. This research proposes that as a result of these conditions, causal powers, and the manifested generative mechanism, cultural lock-in has positively contributed to local institutional thickness by strengthening volunteer efforts, community participation, and social

trust. There is also an element of human agency within these structures, illustrated in the efforts of certain community members such as the Mayors and Town Clerks of Brigus and Trinity. Specific individuals make large contributions to their community and mobilize local efforts within the larger civic structure. An example of this comes from the Mayor of Trinity, who has been praised for his dedication to fundraising for the town and THS.

The next task was to identify the causation for low rates of local participation in tourism entrepreneurship (demi-regularity # 2). It was discovered that residents' perceptions of tourism were overwhelmingly positive (socially and economically). Further analysis determined that local residents' causal powers (e.g. stemming from a lack of entrepreneurial spirit, history of dependence on state subsidies/E.I, conservative approach to finances) were activated, or were absent but identified (many locals did not embark on tourism entrepreneurship), under changing conditions (i.e. new opportunities in primary resource sector), which manifested a 'path-reversion' mechanism. Innovation in the resource sector (e.g. ocean technology) has led to a rise in new industries (e.g. aquaculture) (Department of Tourism, Culture, Industry and Innovation, 2017c). The evolution of path dependence can see multiple paths ensue within a region. Local agents that engaged in path-reversion appear to have little effect on tourism path-extension and path-renewal in Trinity, as it continues to diversify as a result of commercial counterurbanization (i.e. in-migrant entrepreneurs). Yet, path-exhaustion is possible given the indicators that appear to be occurring in Brigus.

A final observation is that tourism is clustering in only one of the two study sites: Trinity (Bight) (demi-regularity # 3). It is determined that newcomers possess the agency required to lead diversification and regional collaboration in light of declining regional funding. Some of the causal powers responsible for diversification and collaboration result from the ability to see an opportunity from an outsider perspective, an absence of cognitive and political lock-ins (like those of locals and returnees), and the desire to be a part of the local community. Discontinuation of government funding called for greater collaboration with surrounding communities. This was most evident in Trinity (Brigus has largely avoided tourism collaboration with surrounding communities). As such, it is determined that geographic isolation, and the associated barriers, is the generative mechanism responsible for peripheral tourism clustering. This mechanism is activated under the condition of decreased government support for REDBs and increased investment in innovative private sector activities. Newcomers appear to be drawn to these

regions because of their rurality and, in doing so, recognize that to sustain these regions, greater collaboration and networking is required. Social trust is generated because of their desire to become part of the local community (e.g. volunteering, creating non-profit groups, hiring local people). Social trust enables newcomers to act as bridging mechanisms between external and internal parties (i.e. government and local community). For these reasons, it is possible that peripheral locations are more predisposed to cluster development and regional cooperation than regions in closer proximity to urban centres.

Three generative mechanisms are casually linked to each of the themes presented above. As per critical realism, however, causal powers and generative mechanisms are only explanations, not predictions, of the observed phenomena, based on judgemental rationality. This is because under different conditions, it is not possible to predict that these causal powers and generative mechanisms will produce the observed empirical events. However, under similar conditions to this research, such generative mechanisms may have considerable explanatory power when applied to other path dependent regions. That being the case, these mechanisms: a) collective diasporic identity, b) path-reversion, and c) geographic isolation/barriers, are concretized and contextualized (Stage 6) with existing research in the final chapter.

## **9 Conclusion**

### **9.1 Summary**

This chapter accomplishes three tasks. First, the final stage (six) of the explanatory research model is examined, which includes the concretization and contextualization of the event mechanisms. Next, academic implications, and theoretical and methodological contributions, of this research are presented. Finally, Chapter 9 outlines challenges and limitations of this study, as well as recommendations and avenues for future research.

### **9.2 Concretization and Contextualization**

#### **9.2.1 Civic Sector's Role in Path-Creation**

Path dependence literature emphasizes the crucial role of the private entrepreneur to create new path trajectories in declining post-industrial communities. For example, Gill and Williams (2016) support the notion that “Innovation and entrepreneurship are central constructions in path creation... Visionaries or inventors have an idea, but entrepreneurs are necessary to put these ideas into action” (p. 52). Whereas others (Stack and Gartland, 2003) explain that by “mindful deviation, path creation writers mean that entrepreneurs often need to change the endogenized social practice, regulations, or institutions away from an accepted, comfortable, or optimal structure” (p. 489). In reference to tourism communities, Brekke (2015) finds “Entrepreneurship is a fundamental driver of economic evolution”, and “entrepreneurship results from reproduced structural or regional conditions... entrepreneurial activity transforms these structural conditions” (p. 205). However, some claim that “Path dependence refers to the inertia of existing business institutions, while path creation is the result of the strategic conduct of actors that aim at bringing about change” (Caron and Turcotte, 2009, p. 277). In this sense, path-creation is about agency within a structure, which implies that innovation is not confined to the private sector entrepreneur.

Critical to path-creation are exogenous (e.g. government funding, external capital) and endogenous (e.g. local community) forces. According to this research, the “catalyst of change-- human agency” (Gill, 2017, p. 29), is not limited to private sector entrepreneurs, but rather, radical innovation was pursued by civic groups and local volunteers. This is illustrated in

examples of community members, such as the Mayors, Historical Society Presidents, and Town Clerks, who established key events/attractions like the Blueberry Festival and Trinity Museum. Their commitment to generating new forms of economic development was essential to creating a new tourism path trajectory. Though some authors (e.g. Brouder and Fullerton, 2015; Mitchell and O'Neill, 2016b; Steel and Mitchell, 2017) indicate, indirectly, that civic groups are a part of the broader processes involved with path dependence and path-creation in post-industrial locales, they are not recognized as potential catalysts of branching innovating trajectories. The closest occurrence to this in the regional development literature is a combined effort of civic society, the state and the market in the form of tourism partnerships (Bramwell and Cox, 2009). The inclusion of civic organizations is proposed by Greco and Fabbio (2014), as a strategy to diversify the “mono-structural local economy” of “cultural dependence”, creating a difficult trajectory to diversify (p. 427). They postulate that “New values as well as a greater civic awareness have had the potential to disrupt previous economic and institutional lock-ins and to set the conditions for a path departure” (Greco and Fabbio, 2014, p. 428).

As seen in this research, civic group and volunteer motivations, driving new tourism paths, stem from a ‘collective diasporic identity’. This term was coined by Chiang (2010) to describe the emotional attachment of diasporas to their homeland and the social fabric of their former communities (e.g. shared history, identity, cultural traditions). This collective identity can be used as a tool of survival and resilience when encountering circumstances that threaten their mutual attachment to place. The terminology here differs slightly, in that ‘collective’ insinuates a shared understanding, if not personally, of someone who has experienced forced relocation after the disappearance of their community, or, the feeling of being threatened by the prospect of losing their unique community identity. The response to this is a collective effort to resist displacement and urbanization via communal activities, volunteering, engaging in expression of cultural traditions (e.g. cultural heritage tourism), and so on, like that of which was observed in Brigus and Trinity (Bight). This collective diasporic identity drives agency within these social structures, and, in these cases, embodies civic groups and volunteers. Further examination of local civic groups, such as Historical Societies, and the individuals who comprise them, should be pursued to enhance our understanding of the impacts that non-private sector actors can have in breaking the path dependent locked-in cycle of post-industrial rural regions.



### 9.2.2 Future of Local Entrepreneurship

It is not surprising that ‘path-reversion’ is occurring in rural Newfoundland given that government-led change is often met with hesitation from rural populations. This is especially true in scenarios where locals hold the notion that government is accountable for past insufficiencies and poor management, causing a climate of fear, distrust, and “people’s lack of interest in innovation and enterprise” (Malek et al., 2017, p. 147). Tourism occupations sometimes hold negative stereotypes (e.g. uneducated), and those in the resource sector are not “eager to change their career” (Lundmark, 2005, p. 41). Some suggest that “reluctance among locals to work in non-resource sectors (particularly service-oriented ones), has been identified as an important reason why industries like tourism are a poor substitute for declining resource industries” (Carson and Carson, 2014, p. 463). Add this to existing deterrents of tourism entrepreneurship in rural Newfoundland (e.g. diminished self-confidence due to economic history, risk) and it is easy to understand why local residents gravitate to alternative employment options when opportunity arises in traditional resource industries.

This study determines that that actions of communities (or community members), who chose to return to resource sector employment, are indeed indicative of ‘path-reversion’. This may also occur if resource industries experience a “re-boom”. For example, Saxinger et al (2016) have found that single-resource industrial regions may experience a “re-boom” (p. 55). According to Jacquet (2014), there is evidence of “repeated mini-booms and mini-busts” in oil and gas sectors in parts of the United States (e.g. Utah, Colorado, Wyoming) (p. 8328). These examples suggest that the evolution of some path dependent communities may be cyclical. While examples in this research point to a layering process of innovation in the resource sector (e.g. new ocean technology), it is not entirely impossible for the mainstay fishery to make a comeback. In this event, path-reversion would involve a return to a path that was once nearly exhausted.

Talk of a returning codfish industry has been ongoing since the initial collapse in 1992 (e.g. DeYoung and Rose, 1993; Wroblewski et al., 1996; Robichaud and Rose, 2002). In recent years, these conversations have intensified. In 2013, a paper titled *From cod to shellfish and back again? The new resource geography and Newfoundland’s fish economy*, describes this cyclical return: “the collapse of cod, the rise of shellfish and recent efforts to re-establish cod” (Mather, 2013, p. 402); albeit, the commercial fishery is still far from reopening. Promising though, some

studies conclude that cod stocks “could rebuild, perhaps within less than a decade, to historical levels of sustainable yield” (Rose and Rowe, 2015, p. 1789). Recent news articles label the return of Northern cod supplies after 25 years as “quite spectacular” (CBC, 2015, citing Rose), or go as far as suggesting “Groundfish is not coming back, it is back” (Smellie, 2017, citing Watkins).

Last year, it was announced that venture capitalists from Japan are interested in investing \$90 million U.S in the former shrimp plant in Port Union that closed in 2010. This news is well-received by stakeholders and local residents alike, as the plant was once a major employer to the region. Furthermore, members of the community have been looking for ways to “breathe new life into the facility” (Walsh, 2017). In this event, a branching innovating trajectory is neo-endogenously induced by external investment, and would involve path-reversion stemming from a ‘combination’ process. Combination is proposed as a forth process, since old paths are being renewed through layering (i.e. seal processing) and conversion (i.e. shrimp plant converted to seal plant). At the same time, branching innovating path trajectories are growing, as counterurbanites continue to relocate and open tourism-related firms. In other words, regions that are industry cyclical (i.e. path-reversion/re-booming) may result in a fourth process: ‘combination’, which involves layering, conversion, external investment, and a reversion to the original industrial path.

### **9.2.3 Newcomer-Led Peripheral Tourism Clustering**

This study found that one location had achieved more neo-endogenous development goals and regional tourism clustering. It is determined that newcomers possess a unique ability to operate successful tourism businesses in geographically marginalized and isolated locales. Carson and Carson (2014) identified ‘geographic location’ as a factor that influences which rural area counterurbanites choose to relocate. They suggest that communities near urban hubs and transportation routes facilitate greater accessibility, and are in a better position to attract newcomers (Carson and Carson, 2014). Others (Eliasson et al., 2015; Westlund and Pichler, 2013), too, found that metropolitan-adjacency is a determinant to counterurbanite moves, particularly those who are attracted to rural amenities and motivated by amenity and lifestyle factors. In Australia, for example, as much as seventy-seven percent of lifestyle rural in-migrants chose to relocate to the Southern Highlands because of its close proximity to Sydney (110km),

coined the “comfort zone” (Drozdewski, 2014, p. 96). This study found a higher ratio of returnees in Brigus, whereas Trinity Bight was home to a higher ratio of newcomers. At least according to this research, newcomers are more likely to in-migrate to areas further from the metropolitan core.

Some suggest that “small tourism and hospitality firm[s] in peripheral areas” may benefit from “the appeal of nature and solitude, cultural authenticity, [and] personalized service” in the presence of government support (Getz et al., 2004, p. 18). Lifestyle and amenity rural in-migrant entrepreneurs tend to relocate based on their perceived quality of life, rather than profit motivators, and, almost always, after visiting their destination choice (Iversen and Jacobsen, 2016). Because Trinity Bight had already been established as a primary tourism destination, it is no surprise why vacationing newcomers visited, and subsequently migrated to, these peripheral communities. Moreover, Nash and Martin (2003) explained that although remoteness “is a major problem in terms of accessibility there are certain contradictions in that there are also tourism advantages associated with peripheral remoteness”, which tend to “centre on the increasing demand for remote, rural and unspoilt areas, of which peripheral regions tend to be the most prominent” (p. 162).

From what is learned of communities in rural Newfoundland, regional networking and collaboration is a challenge. This complicates development of tourism trajectories as agglomeration economies provide greater opportunity for remote and peripheral firm survival (North and Smallbone, 2006). Most newcomers to Trinity Bight who opened a tourism firm relied on profits to afford their rural lifestyle. In most cases, to succeed in a peripheral location, collaboration, networking, and community promotion (e.g. volunteering, investing in heritage structures) is necessary (Müller and Jansson, 2007). Newcomers have a unique advantage because of their outsider perspective, international experience (at least six counterurbanites in this case), financial capability to invest, and freedom from structural lock-ins (e.g. political, cognitive). Also, Iversen and Jacobsen (2016) suggest that local acceptance, social trust, and networking, influence a decision to open a firm, and determine its success. In this sense, “trust can have very material impacts on immigrant businesses because it determines their ability to acquire financial and human capital” (Turkina and Thai, 2013, p. 111). This research found that building social trust and relationships is also important, as newcomers are more often feared by local residents than their counterparts (i.e. returnees). This prompted newcomers to Trinity Bight

to engage in local events and community building projects (e.g. facilitating community gatherings at cafés and the hostel). Furthermore, newcomers may be advantageous to rural development because of their ability to facilitate conversation as ‘bridge builders’ or ‘known strangers’ between local communities and government(s). Rural newcomer entrepreneurs can be particularly helpful in facilitating path-creation because of this social trust with the community, and their ability to network and create dialogue with external sources (e.g. government funding).

### **9.3 Academic Implications**

This study takes a critical realist approach to better understand the processes occurring in post-industrial regions of developed economies through the lens of evolutionary path dependence. In doing this, this research contributes to the awareness of the role of rural in-migration in shaping development trajectories of rural communities experiencing negative structural lock-ins (e.g. cognitive, political). Newfoundland is one such region of eastern Canada with a historically complex political landscape, a record of economic instability marked by a dependence on natural resources (Wright, 2003), and a unique and contentious diaspora of its people, on, and off, the island, that has shaped the social and cultural identities of outport communities (Delisle, 2013). Two communities under study previously held dominant economies in the fishing industry. It is confirmed that both Brigus and Trinity opted to create new development paths in tourism, expressly post-cod moratorium.

The primary goal of this research was to determine whether or not amenity-seeking counterurbanites contribute to the creation of a cultural heritage tourism trajectory in rural Newfoundland, and, if so, are promoting neo-endogenous development. This research approached this question with three main objectives: to understand the role that counterurbanites play in the development of a rural tourism trajectory; to understand the types and motivations of rural in-migrant tourism operators who chose to open a business; and to assess the impacts of counterurbanites.

A critical realist worldview was chosen to guide the research process and analysis. This is because of the evolutionary nature of economic and social systems, which constitute the structures and conditions that largely dictate path dependent trajectories; those of which can only truly be understood through ontological stratification. Evolving economies are social systems that are differentiated, inherently complex, and in constant state of flux, and thus are causally

non-deterministic and uniquely time-space dependent (Martin and Sunley, 2006). In these open systems, events occur regardless of whether they are experienced. It is only when a system is closed that events can be empirically investigated, and thus it must be acknowledged that causal powers and generative mechanisms exist in a domain of reality that is independent of human knowledge (but can be fallibly understood) (Bhaskar, 1978). For this reason, experiences, events, and mechanisms “constitute three overlapping domains of reality, viz. the domains of the *real*, the *actual* and the *empirical*” (Bhaskar, 1978, p. 56). Here, these domains are understood and casually linked through the six stages of the explanatory research model. Theoretical and methodological contributions of this research are presented below.

### **9.3.1 Theoretical Contributions**

This study provides three contributions to the conceptual understanding of path dependence in post-industrial rural regions. First, it is proposed that civic sector actors offer considerable advantages to path dependent rural regions. Thus far, research in these rural areas emphasizes the importance of innovative entrepreneurs to break locked-in declining trajectories (e.g. Baumgartner et al., 2013a; Brekke, 2015). While it may be true of some locales, and it is not disputed that entrepreneurs contribute significantly to branching innovating trajectories, local civic groups and volunteer organizations may also be important stimuli to the initial stage of this process. This may be especially true of civic members who embody a collective diasporic identity, which ensues from collective experiences of survival, threats to cultural or territorial extinction, and/or unity, togetherness, and closeness that is familiar of small town life. What is more, civic and volunteer groups that share this identity can ensure that some paths (e.g. tourism) retain authenticity, and refrain from morphing into undesirable states (e.g. mass tourism). This presumption is drawn from that nature of civic activities in rural communities, which typically involve long-time volunteers, and cultural and historical-infused motivations (e.g. Beel et al., 2015).

Another conceptual contribution are the concepts of ‘path-reversion’ and ‘combination’, which are postulated as a fourth phase and process that can be used to understand and explain the evolution of rural communities. Previous studies acknowledged path-exhaustion, path-extension, and path-renewal as processes that transform rural landscapes (Brekke, 2015; Steen and Karlsen, 2014). Path-reversion describes how rural regions evolve cyclical, if alternative, or returning (i.e.

re-booming), primary sector options become available. This contributes to our understanding of path dependence in that some locales may choose to abandon branching innovating paths if preferable (e.g. culturally, economically) opportunities avail. This implies that paths created could be temporary, and that not all branching innovating trajectories should be viewed as permanent but, rather, as remedial solutions to urgent situations, in geographic regions with limited economic alternatives.

A final contribution to the theory of path dependence is the notion that the type of counterurbanite entrepreneur may influence the evolution of a path trajectory. Moreover, newcomers offer a unique outsider perspective, free from political and cognitive influences; unlike local residents and rural returnees. Newcomers also exert more effort to achieve a sense of belonging and acceptance in an unfamiliar community, especially in peripheral areas where local residents are leery of the unknown. Because of this, newcomers participate in local events, open their businesses to community gatherings, enrol in civic activities, and engage in other assimilation measures. These factors can impact the development of a path trajectory, in terms of its ability to extend and/or renew, remain relevant and innovative, and evolve into a regional cluster. This is particularly true of remote and peripheral communities that have low rates of resident participation in entrepreneurship, anxieties of regional amalgamation and government control, strong civic sectors to create a platform for such development, and passionate local people who embrace and are open to change.

### **9.3.2 Methodological Contributions**

This research contributes to our understanding of critical realist comparative case research methodology. Critical realists promote the use of comparative case analysis to isolate varying structures and conditions between two examples, which otherwise appear to be relatively homogenous in a given geographic space. To some (Ackroyd, 2004), case studies that are examined in similar contexts, but have marginal differences, enable the illumination of case specific structures, causal powers, and their generative mechanisms. This approach is novel because similar comparative case studies of resource-town path dependence are not examined through critical realism (e.g. Machlis et al., 1990; Petkova et al., 2009; Tonts et al., 2012b). One study that did resemble a critical realist approach to comparative case research focused on two

resource paths (cod and salmon) in a single location (i.e. not two different places within a larger geographic space) (Aarset and Jakobsen, 2015).

This comparative case research is also unique in that it is both extensive (quantitative) and intensive (qualitative). This enables the researcher to: a) intensively examine specific structures and causal powers (one case site), and, the understanding of these structures and causal powers by way of comparison (two case sites); and b) extensively examine the interaction of structures and causal powers in a singular context (one case site), and, the interaction of structures and causal powers in multiple contexts (two case sites) (Morais, 2011, see also Ackroyd, 2004). In other words, this research methodology applies a critical realist approach to comparative case studies, to examine the evolution of two community's tourism path trajectories, within the same geographic space. Using both extensive and intensive research methods in a comparative study enables a more comprehensive examination of the active causal powers of a structure occurring at each site, while, at the same time, involves a comprehensive examination of these structures' causal powers, by comparing and contrasting them (or lack thereof) at two different locations. By doing this, the researcher can better understand how these causal powers, and their mechanisms, impact path dependent regions. Examples of this approach in this research are provided here.

*Intensive:* This research determined that a structure's causal powers at one site (newcomers and their outsider perspective, uninfluenced political/cognitive lock-in, etc.), which was not present at the other site (only one newcomer was found in Brigus), are furthering the branching innovating trajectory via tourism clustering and regional collaboration. Without the use of a second case (i.e. Brigus), this explanation would not be as credible.

*Extensive:* The overall goal was to examine, and compare, tourism path trajectories at both study sites. While accomplishing this, co-evolving paths were observed to be occurring within each study site. It is determined that, for instance, civic groups and counterurbanites are furthering the tourism path trajectory. Local residents, in private sector tourism, however, are largely engaging in path-reversion, which involves the return to primary sector resource industries. The use of extensive research (e.g. resident surveys), thus, ensured that the researcher did not focus too narrowly on one single path. Using only intensive (e.g. business interviews) research methods would not have resulted in the discovery of multiple paths, and, why they are emerging.

Therefore, this research's methodological contributions illustrate how extensive and

intensive critical realist comparative case research can enhance our understanding of structures and their causal powers within a single case, and, between two cases, within the same geographic space. This, according to Brannan et al (2017), offers more explanatory power than single case studies, as the “ability to determine causes and effects is ostensibly enhanced as the population grows”, as the addition of alternative structures and conditions can “attempt to ‘explain’ variation between results and the presence of forms of bias” (p. 13).

#### **9.4 Research Challenges and Limitations**

One obstacle the researcher experienced was that the pre-determined study sites had very limited commercial activity. Because the coast of rural Newfoundland is comprised of hundreds of small communities<sup>81</sup>, tourism activity is concentrated in only a small number of areas. Upon arrival in Newfoundland, new study sites were chosen based on the presence of tourism business activity. This ties into a limitation of this research, which is the small sample size of tourism venues in each community, particularly Brigus. A larger sample size could indeed lead to different outcomes. Another challenge of this research is related to the short tourism season on the east coast of Canada. In rural Newfoundland, the tourism season is primarily limited to two months (July and August); with some tourism activity occurring in the shoulder season (May, June, September, October). This decreased the time that was allotted for business interviews. Since the window of operation for businesses is narrow in the summertime, some participants were unable to provide interviews as their time was occupied. Furthermore, these time constraints could inhibit a respondent’s answers due to the lack of time afforded to some interviews.

Critical realism is considered a robust and emancipatory paradigm because it does not limit our interpretation of the world to a singular objective (positivist), or multiple subjective, reality(s), and thus, knowable knowledge (Lennox and Jurdi-Hage, 2017). Critical realism sees reality as independent from our knowledge of it, but does not dispute that humans cannot attempt to understand this through social science. However, some knowledge can be gained “in terms of theories, which can be more or less truth like” (Danermark et al., 2002, p. 10), but never entirely

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<sup>81</sup>Statistics Canada (2016). Populations and Dwellings, Newfoundland and Labrador  
<http://www12.statcan.gc.ca/census-recensement/2016/dp-pd/hltfst/pd-pl/Table.cfm?Lang=Eng&T=302&PR=10&S=86&O=A&RPP=25>



truthful, as reality is always historically, culturally, and social determined (Archer et al., 2016). As such, developing an epistemological meta-theoretical framework from extant literature is problematic, yet unavoidable. The concern here is, even if the researcher accepts the idea of a stratified ontology, reality is still embedded within our knowledge of the world and what humans are capable of knowing. With this considered, a researcher's subjectivity is exposed to confirmation and narrative bias and inevitably predisposes their interpretations and explanations of structures, causal powers, and generative mechanisms, and thus, the phenomena at large (Mingers, 2004, 2006). Another difficulty arises when a researcher attempts to overextend the limits of case research, to include infinite theories and empirical outcomes, to fit with critical realist ontological primacy. In doing this, the researcher may dilute the quality of a study in search of a few possible generative mechanisms and outcomes. In other words, broadening the scope of research can diminish the quality of outcomes. Though this is necessary of critical realism research, to meet ontological obligations, the researcher, in this case, is left with an abundance of empirical data that is of little relevance to the proposed outcome. One benefit of this, however, is that it provides ideas, and an opportunity, for further investigation of unused material.

## **9.5 Tourism Today in Rural Newfoundland**

Since the completion of this fieldwork in 2012, the importance of tourism to sustaining rural Newfoundland has only amplified. However, while tourism remains an important economic engine (e.g. Baldacchino, 2015; de Lange and Dodds, 2017; Okech, 2016; Ward et al., 2017), it alone is not enough to save the island's outports (Springuel, 2011). One of the biggest challenges still facing non-metropolitan regions of Newfoundland is the increasingly aging and declining (out-migrating) rural population (Butters et al., 2017). A 2016 regional population projection report predicts that by 2036, up to forty percent of the rural population could disappear (Simms and Ward, 2016). A similar report, released in 2017, identified smaller communities in peripheral areas, which lack urban adjacency or close proximity to central hubs, and that are "dependent on a single industry", as the most vulnerable to collapse (Simms and Ward, 2017, p. 8). The current predicament of decline has sparked fears of another phase of resettlement because of rising costs of service provisions in remote regions (Simms and Ward, 2016), and intensified efforts to create a resilient and economically diverse rural landscape (e.g. Marland and Moore, 2017).

Two recent Newfoundland studies, released in late 2017, run parallel to some of the overall themes found in this research. These articles shed light on the changing nature of rural governance and the important role of entrepreneurship, innovation, and industry pluralism and collaboration (Carter and Vodden, 2017), and how past events (history) contribute to cultural heritage place-based assets and a strong sense of rural community identity (Butters et al., 2017). Social enterprise development is also generating momentum in rural Newfoundland. Though not new to the province (e.g. Griffin, 2014; Johnson, 2010; Lionais, 2015), a “growing number of social enterprises in Newfoundland and Labrador are helping to bring hope and opportunity to rural areas” (Slawinski, 2017b), such as Fogo Island’s Shorefast Foundation; a non-profit (federally registered charity) led by a rural returnee –turned social entrepreneur, which uses a “tourism and culture based model that features sustainability and heritage preservation”, and “serves as a valuable example of ways to harness community assets and motivation for regional development” (Wilson, 2017, p. 195). Some have noticed that these “enterprises have the potential to empower community members and to help build sustainable local capacity”, and “when done well, these organizations can bring employment, resources and an enhanced sense of pride to rural communities” (Slawinski, 2017a).

Social enterprise (organizations which are created for social purposes), social entrepreneurship (the processes underpinning “innovative and entrepreneurial activity for social purposes”) (Luke and Chu, 2013, p. 764), and private business development in general is not limited to the tourism industry. Recent press releases indicate that “Entrepreneurship in this province is booming” in a wide range of firm activities (The Southern Gazette, 2017), and that there is “growing entrepreneurial spirit taking over the province”, which increasingly involves younger generations (Oliver, 2017). Speaking to this point, educational institutions, such as Memorial University of Newfoundland, are ever more enthusiastic about expanding the presence of the private sector in the province. Entrepreneurship is a focal point of one of their newly designed graduate programs. The establishment of the Centre for Social Enterprise in 2016 is also a result of Memorial University’s collaboration with the Shorefast Foundation. Interestingly, the newly appointed Dean of the Faculty of Business Administration is a “newcomer” from Montreal, who “is keen to expand her faculty’s role in contributing to the province’s well-being” (Lewington, 2018).

Touched on in Chapter 8, newcomers and returnees are increasingly relocating to rural

parts of Newfoundland to start a business. A large portion of these newly established in-migrant proprietors appear to be drawn to the Bonavista Peninsula. Notably, however, in-migrant tourism entrepreneurs are much younger than participants of this research, which is verified in a recent news piece: “millennials have begun to flood these lonely outport towns, offering a revitalizing injection of young entrepreneurial spirit” (Presser, 2017). The author spoke with several young business owners in Trinity Bight and the town of Bonavista, who revealed that new businesses are sprouting up in response to demands from a growing number of tourists visiting the area. This has led some to believe that “tourism is definitely the future of the area”, and with the season now stretching to as long as six months of the year, “it’s now definitely doable to sustain a lifestyle here” (Presser, 2017). Another report in CBC News in 2017 spoke of the 32 year old Mayor of Bonavista who “helped move in 37 new residents just last year, and the average age was 33...In Bonavista over 30 new businesses opened in the last two years” (O’Neill-Yates, 2017). More importantly, most businesses that are established by newcomers and returnees are year-round, and cater to a broad range of local and tourist needs (e.g. photography, restaurants, craft shops, bakery) (Lafrenière, 2016).

Local entrepreneurship appears to be on the rise in other parts of rural Newfoundland. One local resident in a small town in the Placentia Bay area has recently purchased and converted an old fish plant into a medicinal cannabis production facility that will employ up to 40 local residents (Keating, 2017). A local government official praised the development, indicating that “Economic diversification is key if we are to put our rural economy on a sound footing, and diversification can come in many forms. We need more investment in our communities and anytime we see this in rural areas is positive news” (Keating, 2017, citing Browne). On the other side of the island, in the tiny community of Flat Bay, Memorial University students from Grenfell Campus enrolled in entrepreneurship courses are engaging with local Indigenous people to establish tourism social enterprises (Gill, 2017). The assumption is that “tourism is something that everyone in this community can take part in”, which has suffered since the decline of their once prosperous eel fishery (Gill, 2017). Not only does tourism provide income to local residents, but it also “promotes and celebrates the local Indigenous heritage” (Gill, 2017).

While entrepreneurship seems to be gaining momentum among local residents and in-migrants, the importance of rural economic diversification (Stoddart and Graham, 2017) and industry clustering is also at the forefront (Skinner, 2012). Consequently, Carter and Vodden’s

(2017) recent work calls for an increased focus on rural resource-dependent remote regions of Newfoundland, some of which do not bode well with cluster development (e.g. isolation, technology barriers), but could benefit from strengthening the entrepreneurial presence and “a formation of regional level government”, which could “strengthen the smaller municipalities and unincorporated communities with limited capacity” (Carter and Vodden, 2017, p. 88). Fortunately, there are many indications that rural Newfoundland has garnered a lot of attention and support. For example, *Rural Resilience* is “an engaged community of research and practice”, which is “dedicated to advancing the resilience and sustainability of rural communities and regions in Newfoundland and Labrador and beyond” (Rural Resilience, 2018). This network of faculty and other scholars has produced dozens of reports on research projects examining current issues facing peripheral areas of the province. These projects speak to topics such as networking, tourism, regional development and governance, entrepreneurship, industry clustering, economic diversification, and rural innovation (Rural Resilience, 2018).

#### 9.5.1 Brigus

Since this study took place, the Town of Brigus has received \$279, 850 from ACOA, and more than \$82, 000 from the Department of Tourism, Culture, Industry and Innovation for tourism development to “strengthen the town’s reputation as a ‘must-see’ heritage destination” (Atlantic Canada Opportunities Agency, 2017). In addition, the BHCS received an investment of \$63, 300 from ACOA, topped up with \$43, 300 from the Department of Tourism, Culture, Industry and Innovation (Atlantic Canada Opportunities Agency, 2017). Monies going to the Town are allocated for “creating a Visitor Services and Experience Map”, and “enhancing the Lighthouse Trail with new signage, improved parking and trail upgrades; and creating a permanent stage and storage area for the annual Blueberry Festival and other community events throughout the summer and shoulder seasons” (Atlantic Canada Opportunities Agency, 2017). Plans for contributions to the BHCS include operations at the newly relocated Pinkston Forge (2014), upgrades to the Stone Barn Museum, and establishing two new touristic tours: *Hike to the Brigus Light*, and *Walks through Brigus* (Atlantic Canada Opportunities Agency, 2017).

Mentioned above, the Pinkston Forge is the latest addition to the properties owned and operated by the BHCS. The forge, built in 1889, had been out of commission since 1976. In 2014, a local family donated the forge to the BHCS, and it reopened in 2017 (Robinson, 2017).

A portion of the recent provincial-federal funding package employs a Newfoundland resident, who the BHCS paid for to attend school in Ontario to become the forge's apprentice blacksmith (Robinson, 2017). This new tourist attraction is intended to give people "something from out of the past", and is anticipated to help extend the tourist season into the shoulder months (e.g. June and September) (Robinson, 2017). New developments in the private sector include the 2017 reopening of the old Convent under new management as a B&B and Gastropub. The owners, local to the area (Wells, 2017), filled a gap in the tourist market with their upscale locally (e.g. salt cod fish cakes, blueberries-the town's signature berry) and non-locally (e.g. Irish breakfast) inspired fare (including gluten-free and vegan options), and elegantly designed rooms, complete with complimentary Wi-Fi and optional upgrades (e.g. Jacuzzi tub) (Seasalt and Thyme, 2017). It also appears that at least three vacation home rentals have opened in the town since 2012 (TripAdvisor, 2017).

This study found that tourism in Brigus is relatively underdeveloped compared to Trinity, which expanded into the regional destination known as Trinity Bight. Yet, there are signs that Brigus is on the radar of at least two new entrepreneurs who intend to open the first microbrewery in the area since 1997 (The Compass, 2017), when the only brewery moved out of a near-by community (Newfoundlanderbeer, 2012). Despite the possibility of this innovative new business addition to Brigus, entrepreneurial interest appears to remain marginal in comparison to more current developments in Trinity Bight.

### **9.5.2 Trinity Bight**

Tourism in Trinity Bight has also benefited from provincial and federal government funding. A recent investment of \$104, 412 and \$95, 118 was made from ACOA's Innovative Communities Fund and the Department of Tourism, Culture, Industry and Innovation, respectively, to finance the region's ecotourism initiative: Discovery Aspiring Geopark Inc. (Department of Tourism, Culture, Industry and Innovation, 2017b). The Geopark was only beginning to generate discussion at the time of this research, and has since reached a stage where the organization intends to seek UNESCO Global Geopark designation (Department of Tourism, Culture, Industry and Innovation, 2017b). Other civic groups, such as the THS, continue to benefit from significant government contributions to drive the local tourism sector. For example, in 2014 the group received \$121, 000 (\$60, 498 -- ACOA's Business Development Program, and

\$60, 498 – Department of Innovation, Business and Rural Development) to roll out a number of local projects (e.g. workshops, tourism engagement programs) aimed at emphasising craft development and cultural tourism enrichment (Atlantic Canada Opportunities Agency, 2014). Another major development is a non-profit community aquarium in Champney's Arm, located in the Bight area less than 10 kilometres from the town of Trinity. Federal (\$205, 601) and provincial (\$181, 224) funding, as well as contributions from other local foundations and fundraiser events, was secured by the civic group, Champney's West Heritage Group Inc., whose vision is to "promote the cultural heritage of the community and the region" (Champney's West Heritage Group Inc., 2017). Municipal governments are also recipients of provincial and federal grants. For instance, in 2015, the Town of Trinity obtained a sizable contribution of more than \$280,000 from ACOA's Innovative Communities Fund to update their existing park and waterfront (Atlantic Canada Opportunities Agency, 2015).

Private tourism-related firms, too, have accepted government financial assistance to enhance their tourism products. Tracy's luxury-style inn and restaurant, for example, accepted \$22,500 from the Department of Tourism, Culture, Industry and Innovation's Business Development Support Program. Funding is conditional, in that it must be matched by the grant applicant, and is anticipated to "assist with marketing and training initiatives including the development of a new marketing plan, website, social media plan and updated marketing materials" (Department of Tourism, Culture, Industry and Innovation, 2017h).

New firms have also located in the region of Trinity Bight. One unique addition is a craft beer microbrewery in Port Rexton. In 2016, a returnee, and her newcomer wife opened their business in the area because they "fell in love with the rural lifestyle...The atmosphere, the raw beauty of Newfoundland, and the friendly people" (Barry, 2016, citing McDonald). The couple received government assistance in the form of repayable loans (i.e. \$49, 875 – Atlantic Canada Opportunities Agency, 2012c) and non-repayable contributions (\$49, 875 – Atlantic Canada Opportunities Agency, 2012b), for building renovations and equipment costs, and to hire expertise and assist in operations. Some of the other new tourism-related ventures that have opened post-2012 consist of Gary's conference centre, an antique store and coffee bar, a Newfoundland-style restaurant, and at least two B&Bs and seven vacation rental accommodations (TripAdvisor, 2017b).

### 9.5.3 Demi-Regularities: Now and Then

This research found that local Newfoundlanders were responsible for initiating the cultural heritage tourism trajectory at both rural locales. This is largely attributed to their collective diasporic identity, which inspired, and continues to inspire them to be community-minded, promote their culture and history, and involve themselves in volunteer activities aimed at sustaining their outport existence. Five years later, Newfoundlanders are just as enthusiastic, if not more so, about this identity, according to the rise in social enterprise and entrepreneurship in the province. Moreover, their 2017-2020 Provincial Tourism Product Development Plan aims to increase visitor spending from \$1 billion to \$1.6 billion by 2020. The plan's approach seeks to strengthen public, private, and non-profit partnerships to increase tourism branding, quality, and visitor numbers, and to "encourage them to stay longer and experience more" (Department of Tourism, Culture, Industry and Innovation, n.d., p. 4). A primary focus of this plan is to develop activities such as "anchor attraction clusters", and achieve "non-profit attraction sustainably" (Department of Tourism, Culture, Industry and Innovation, n.d., p. 12). Thus, the notion that the non-profit sector and other volunteer organizations would be put at great disadvantage with the discontinuing of REDBs may be unsubstantiated. Evidence of government support for these organizations is visible through the 2017 Tourism Awareness Week, where the provincial government announced nearly \$1 million in funding to over 100 community-based heritage groups through the Cultural Economic Development Program (The Beacon, 2017b).

Another finding of this study was that in-migrants own/operate the majority of tourism-related firms, at least in Brigus and Trinity Bight. This thesis suggests that this could be, in part, related to Newfoundland's historically negative attitude towards entrepreneurship, coupled with increases in alternative employment options in resource extractive sectors. A few years later, and there are some indications that tourism entrepreneurship in rural areas is growing among local residents (e.g. Seasalt and Thyme B&B and Gastropub). Perhaps one of the most ambitious visions for fostering local entrepreneurship stems from Fogo Island returnee, Zita Cobb, co-founder of the Shorefast Foundation (e.g. de Lange and Dodds, 2017). Using her education and experience gained from living off the island, Zita returned on a social mission to save the remote town by investing in local entrepreneurs and cultivating innovation in tourism and the fishery. A newly developed ice cream parlour, opened by a local resident, is just one success story that has emerged from Zita's public-private partnership, which is designed to assist Fogo Island residents

to harness cultural and natural assets for economic development, while reinforcing environmental and heritage-preservation stewardship (Wells, 2016).

Remarkably, this partnership, according to a local economic development officer, created to put a “plan in place to help entrepreneurs blossom”, includes reinventing the fishery (Wells, 2016, citing Pardy). Fogo Island Fish is a leader in this shift. Established by local entrepreneurs, the project employs local fishermen, and promotes the use of hand lining (no by-catch), local fish processing by a Fogo Island cooperative (employs more local people), sells the final product directly to chefs only (fishers earn double market price for their catch by reducing intermediaries), and ensures that surpluses gained through this process are reinvested back into the town through the Shorefast Foundation (Goodchild, 2017). Alternatively, the Ministry of Fisheries and the Memorial University’s Fisheries and Marine Institute are looking to encourage innovation and entrepreneurship in the sector to “maximize value from the seafood industry” (Adey, 2017). This idea involves new business start-ups that use inedible parts of marine species, such as cod, to create products including cosmetics, crafts, and clothing (Adey, 2017). As such, while the entrepreneurial spirit may be growing among local residents of Newfoundland, it is not necessarily devoid elements of traditional resource industries or outport ways of life. The latter example, however, indicates a new innovating branching trajectory is underway that combines elements of the past (i.e. Newfoundland’s cod fishery) with new innovative products (i.e. health supplements).

A final conclusion drawn from this research is that newcomers contribute to industry collaboration and clustering, which is to some degree a result of their outsider perspective, lack of political, economic, and social lock-ins, and ability to mobilize local assets and attract government investments. Today, it appears that cultural clustering and private-public-civic partnerships are intensifying on the Bonavista Peninsula. Trinity Bight, unlike Brigus, is on the direct route to the town of Bonavista, and is increasingly grouped with this growth hub in economic development (e.g. McCallum and O’Brien, 2012; Memorial University Harris Centre, 2016) and media (e.g. Lafrenière, 2016; O’Neill-Yates, 2017) reports, regarding cultural heritage tourism clustering in this flourishing region of the province. However, there are a growing number of returnee entrepreneurs among the list of new businesses in the region. For example, a returnee, who was born in Bonavista, recently returned and opened a business that restores historic architectural structures and built heritage (Riche, 2015). On top of this, the now



university educated returnee sits on Town Council, is the president of the local chamber of commerce, and leads over a dozen committees and organizations (Riche, 2015). Conversely, Brigus does seem to be attracting government, and some private, investment. But, collaboration and tourism partnerships with surrounding communities (e.g. Cupids) have yet to materialize.

Signs of amalgamation and community collaboration are noticeable in other regions of Newfoundland. Drawing attention once again to Fogo Island, a total of 11 communities amalgamated in 2011 to become the Town of Fogo Island (Wells, 2016). A community economic development officer states: “we want to show the world the strength of our commitment by coming together as one town...we are all about uniting” (Wells, 2016, citing Pardy). This could indicate that not only newcomers, but also returnees, have the ability to unify a region and draw external investment to rural areas. Talks of amalgamation in many regions of Newfoundland are also underway. Business owners and economic experts suggest that consolidating services and “continuously innovate[ing]” is the best option to avoid another wave of resettlement (Barry, 2017). One rural resident, speaking at a town hall event, suggests that resettlement has many long-lasting and undesirable consequences,

If we have resettlement, if we have a realignment, if we pave over rural Newfoundland, we will need to develop a new identity for our province and a new tourism strategy...Rural Newfoundland – it is not a town, it is not an outport, it is not a location, it is our culture” (Barry, 2017, citing Lush).

In light of this, it will be interesting to see how the future of rural Newfoundland communities unfolds, and, what role newcomers, and returnees, have in shaping that outcome.

## **9.6 Future Research and Recommendations**

To gain a better understanding of path dependent post-industrial regions, future research should examine the implications of seasonal counterurbanite entrepreneurs, and how they can stabilise, even if only seasonally, depopulating rural regions. Moreover, Stedman (2006) identifies second home-owners as having a strong place attachment to their part-time residences, whereas Jaakson (1986) claimed that second home rural properties are favoured for their sense of community. If this is true, seasonal in-migrant tourism operators are likely to have a vested interest in the vitality of their second home, which will help maintain infrastructure and services in rural communities. However, consequences of seasonal, as well as permanent, counterurbanization, often manifest through gentrification (Guimond and Simard, 2010), and the

inability or unwillingness of in-migrants to assimilate into the local population (Matarrita-Cascante et al., 2017). For example, in-migrants can cause displacement of, and hostility with, long-time residents. As such, future research of the impacts of seasonal counterurbanite entrepreneurs, especially in a time of increasing corporeal and social mobility, would add to existing knowledge of path dependence. Another theme of this research that warrants further inquiry is seasonal workers in rural tourism destinations. More specifically, future investigations should focus on ways to alleviate labour shortages in rural tourism destinations, especially if the goal is to pursue season extension activities/services. Finally, further attention ought to be given to the differences between returnee and newcomer entrepreneurs in rural locales. This study found newcomers to have a significant impact on neo-endogenous processes in at least one sparsely populated peripheral area. Yet, returnees also played an important role in rural development, and are known to possess valuable local knowledge of their community (Gaddefors and Cronsell, 2009) and show leadership in volunteer and civic activities (von Reichert et al., 2014). Furthermore, they may act as important bridge builders of social trust between local residents and newcomer in-migrants.

The researcher has two recommendations for rural Newfoundland specifically. First, continued government support of community and social development programs should be a top priority, particularly because of rural Newfoundland's aging population, and declining interest of younger generations in volunteer-related activities. Additionally, this research highlights the importance of civic organizations and volunteer groups to provide a foundation for private-led development to build upon. Strong civic engagement in local communities is likely to attract entrepreneurs, innovation, and external investment, which can alleviate rural dependence on government transfers. Second, it is advised that rural areas continue to diversify primary and tertiary sector industries, to mitigate the impacts of unforeseen external shocks (e.g. decline in oil consumption). Rural development strategies should also encourage and offer greater financial incentives for local residents to engage in tourism entrepreneurship, if circumstances permit, to preserve the authentic culture and historic charm of Newfoundland's outports. After all, it is the natural surroundings, and genuine, friendly people, that most outsiders are searching for.

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